



San Bernardino

Valley College

FINANCIAL AID OFFICE

### 2018-2019 IRA/PENSION ROLLOVER VERIFICATION WORKSHEET

Last Name	First Name	MI	Student ID	Date of Birth
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The Financial Aid Office at San Bernardino Valley College has received the results from your 2018-2019 FAFSA or Dream Act Application results and has determined that additional information is needed regarding the amount of any untaxed IRA distribution and/or pension distribution which was a rollover. ENTER "0" FOR ANY ITEMS THAT DO NOT APPLY.

Information from the 2016 Federal Income Tax Return of the student/parent(s) whose information was reported on the FAFSA or Dream Act Application:

Please indicate whose information is being reported on this form:  Student's  Parent's  Spouse

1. Enter the amount from IRS Form 1040 line 15a or IRS Form 1040A line 11a (IRA distributions) \$\_\_\_\_\_
2. Enter the amount from IRS Form 1040 line 15b or IRS Form 1040A line 11b (Taxable amount) \$\_\_\_\_\_
3. Was this IRA distribution a rollover?  YES  NO
4. Enter the amount from IRS Form 1040 line 16a or IRS Form 1040A line 12a (Pension/annuity distrib.) \$\_\_\_\_\_
5. Enter the amount from IRS Form 1040 line 16b or IRS Form 1040A line 12b (Taxable amount) \$\_\_\_\_\_
6. Was this pension/annuity distribution a rollover?  YES  NO  
If yes, submit copies of your 2016 1099 R form or page 1 of your 1040 form.

#### Certification and Signature

By signing below you are certifying that all of the information reported is complete and correct. **WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.**

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date