

2021-22 Rollover Verification Form Independent Student

The Office of Financial Aid needs to verify information provided on your 2021-22 Free Application for Federal Student Aid (FAFSA). You indicated on your FAFSA that you had a qualifying IRA and/or Pension Distribution Rollover in the 2018 tax year. Further information about this transaction is required to process your financial aid application.

Priority Deadlines*: Fall 2021 – 07/22/21 | Spring 2022 – 11/29/21 | Summer 2022 – 04/21/22

A. Student Information

			B#
Last Name	First Name	M.I.	Student ID

B. Untaxed IRA Distribution or Pension Rollover

1. Enter the amount from your applicable 2019 IRS Federal Income Tax Return.

Do not leave any field blank. Enter "N/A" if an item is not applicable.

2019 IRS TAX FORM 1040	Untaxed Amount Defined	Untaxed Amount	Rollover Amount
Amount of untaxed portions of IRA distributions	Line 4A minus Line 4B	\$	\$

2. Documentation

Provide **one** of the forms of documentation listed below with this form:

- A copy of your 2019 IRS Form 1099-R
- A copy of your 2019 IRS Form 5498
- A copy of your 2019 Wage & Income Transcript received from the IRS
 - IRS Wage & Income Transcripts can be requested online, by mail, or by phone:
 - To order online, go to www.irs.gov and click on "Get Your Tax Record." Then click on "Get Transcript Online."
 - To order by phone, call 800-908-9946 and follow the prompts.
 - To order by mail or fax, complete IRS Form 4506-T.

C. Certification and Signatures

By signing below I certify 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

Can be signed electronically if submitted via Financial Aid Document Upload Tool in myEFSC.

* This form must be submitted by the priority deadline to ensure a determination of eligibility before the Fee Due Date. Students may still apply for aid after the priority deadlines, but EFSC cannot guarantee that late submissions will be notified of aid eligibility prior to the Fee Due Date.

D. Document Submission

You may submit this document by the following methods:

1. FINANCIAL AID DOCUMENT UPLOAD TOOL (RECOMMENDED)

Complete and sign this document, scan, and upload using the **Financial Aid Document Upload Tool** in **myEFSC** under *Financial Aid Forms & Upload*.

2. BY MAIL

Mail your document to the Office of Financial Aid at:

Eastern Florida State College

Office of Financial Aid

Building 2, Room 209

1519 Clearlake Road

Cocoa, FL 32922

3. IN-PERSON

Please visit easternflorida.edu/go/aidcontacts for current hours and availability.

QUESTIONS?

Financial Aid Specialists are available by phone at 321-433-7339 and via e-mail at finaid@easternflorida.edu.

Eastern Florida State College is committed to equal access/equal opportunity in its programs, activities, and employment. For additional information, visit Eastern Florida State College: easternflorida.edu/go/equity.