



Return this form to:

Mail: One-Stop Student Services
264 Centennial Dr Stop 7155
Twamley Hall Rm 204
Grand Forks, ND 58202-7155

Fax: 701-777-6931

**2021-2022 Verification
of Untaxed IRA/Pension**

Student Information

_____	_____	_____	_____
Last Name	First Name	MI	Student ID
_____	(_____) _____	_____	_____@und.edu
Date of Birth	Telephone Number	E-Mail Address	

INSTRUCTIONS: On the 2021-2022 FAFSA you reported Untaxed IRA Distributions/Pensions.

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

Clarification of IRA, pension, or annuity information is needed to complete the Verification of your financial aid application. The untaxed portion of an IRA, pension, or annuity must be included as untaxed income on your financial aid application unless it was a rollover to another retirement plan. A rollover is a tax-free distribution of cash or other assets transferred from one retirement plan to another. Your federal tax return does not specify whether the amount was a rollover; therefore, please clarify this by selecting one of the statements below. If you are unsure if it was a rollover, please contact your tax preparer or financial advisor.

The IRA, pension or annuity **WAS** a rollover. You/your parent(s) did not receive money and it is still in a new IRA, pension or annuity. Attach Documentation (Ex. 1099-R Distributions from Pensions, Annuities, IRAs)

The IRA, pension or annuity **WAS NOT** a rollover.
You/your parent(s) received money from an IRA, pension or annuity.

The IRA, pension or annuity was a rollover to a **Roth IRA**.
You/your parent(s) transferred money from a traditional IRA to a Roth IRA.

Note: If you/your parent(s) rolled over a traditional IRA into a Roth IRA by transferring funds, the amount rolled over is reported as taxable income on the tax return. You can complete a Special Circumstance Form to reduce the income and taxes paid due to the rollover.

Your financial aid cannot be processed until this information is received.

By signing this worksheet, I/we certify that all of the information reported on this worksheet is complete and correct. If the student is a dependent, at least one parent must sign.

Student Signature: _____ Date: _____

Parent/Spouse Signature: _____ Date: _____

Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.