



Financial Aid
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2019-2020 Verification of Untaxed IRA/Pension

This information is being requested because the U.S. Department of Education would like to verify if the amount of untaxed IRA/Pension listed on your 2019-2020 FAFSA was a rollover. 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 switched from one retirement plan to another. Please refer to your/your parent’s 2017 Federal Tax Return and enter the amounts from the appropriate lines below. Specify whether each was a rollover, a distribution paid to you/your parent(s) (not a rollover), a rollover to a ROTH IRA or a life insurance policy.

STUDENT NAME: _____ **STUDENT ID:** _____

INSTRUCTIONS: On the 2019-2020 FAFSA you reported Untaxed IRA Distributions/Pensions.

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

IRA Distributions – (1040 line 15a minus 15b, 1040A line 11a minus 11b) –

To calculate the amount of untaxed IRA distribution, subtract the amount in “b” from the amount in “a”.

The difference is \$ _____. This is the untaxed portion of the IRA. The IRA distribution came from:

- _____ a rollover (you did not receive the money). ***Send a copy of the 1099 Form showing this rollover.**
- _____ a distribution NOT a rollover (you did receive the money).
- _____ a rollover from Traditional to a Roth IRA. (Note: This amount is taxable)
- _____ a Life Insurance policy.

Pensions and Annuities – (1040 line 16a minus 16b, 1040A line 12a minus 12b) –

To calculate the amount of untaxed pension/annuity subtract the amount in “b” from the amount in “a”.

The difference is \$ _____. This is the untaxed portion of the Pension/Annuity. The Pension/Annuity came from:

- _____ a rollover (you did not receive the money). ***Send a copy of the 1099 Form showing this rollover.**
- _____ a distribution NOT a rollover (you did receive the money).
- _____ a rollover from Traditional to a Roth IRA. (Note: This amount is taxable)
- _____ a Life Insurance policy.

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: _____