



2025-2026  
IRA and Pension  
Rollover Verification

Financial Aid Department  
Phone: 910-938-6749  
Fax: 910-455-2767  
Email: [finaid@coastalcarolina.edu](mailto:finaid@coastalcarolina.edu)

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Print Student's Name

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Student's ID Number

The Financial Aid Department at Coastal Carolina Community College has received the results from your 2025-2026 FAFSA 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 must be reported from the 2023 Federal Income Tax Return of the student/spouse/parent(s) whose information was reported on the FAFSA.

Whose information is being reported on this form? (circle one):    Student    Spouse    Parent 1    Parent 2

Enter the amount from IRS Form 1040-line 4a (IRA distributions) \$\_\_\_\_\_

Enter the amount from IRS Form 1040-line 4b (Taxable amount) \$\_\_\_\_\_

Enter the amount from IRS Form 1040-line 4a minus 4b (Untaxed amount) \$\_\_\_\_\_

Was the IRA untaxed distribution amount on line 3 above a rollover?    \_\_\_\_\_ YES    \_\_\_\_\_ NO

Enter the amount from IRS Form 1040-line 5a (Pension/annuity) \$\_\_\_\_\_

Enter the amount from IRS Form 1040-line 5b (Taxable amount) \$\_\_\_\_\_

Enter the amount from IRS Form 1040-line 5a minus 5b (Untaxed amount) \$\_\_\_\_\_

Was this pension/annuity untaxed distribution amount on line 7 above a rollover?    \_\_\_\_\_ YES    \_\_\_\_\_ NO

**\*If you answered yes to either question above, submit a copy of your 2023 IRS 1040 form to the Financial Aid Department. \***

**Certification and Signature**

Each person signing below certifies that all of the verification documents submitted with this certification are complete and correct. If dependent student, the student and one parent whose information was reported on the FAFSA must sign and date.

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Student's Signature (Required)

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Date

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Spouse's Signature (Optional)

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Date

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Parent's Signature (Required, if dependent student)

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Date

**WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.**