



2026-2027
IRA and Pension
Rollover Verification

Financial Aid Department
Phone: 910-938-6749
Fax: 910-938-6717
Email: finaid@coastalcarolina.edu

Print Student's Name

Student's ID Number

The Financial Aid Department at Coastal Carolina Community College has received the results from your 2026-2027 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 2024 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 2024 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.

Student's Signature (Required)

Date

Spouse's Signature (Optional)

Date

Parent's Signature (Required, if dependent student)

Date

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