



Return this form to:
 Mail: HCC Financial Aid
 606 West Main
 Highland KS, 66035
 Email: financialaid@highlandcc.edu
 Fax: 785-442-6106
 Phone: 785-442-6000 ext. 2002

2023-2024 Verification of Untaxed IRA/Pension

Student Information

Last Name	First Name	MI	Student ID
Date of Birth	Telephone Number	E-Mail Address	

On the 2023-2024 FAFSA you reported Untaxed IRA Distributions/Pensions.

Please indicate whose information is being reported on this form.

- Student's
 Parent's
 Student'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. If you are unsure if it was a rollover, please contact your tax preparer or financial advisor. Your federal tax return does not specify whether the amount was a rollover; therefore, please clarify by selecting one of the statements below.

- The IRA, pension or annuity **WAS** a rollover. You/your parents/your spouse did not receive money and it is still in an IRA, pension, or annuity. Attach documentation like IRS form 1099-R Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
- The IRA, pension or annuity was **NOT** a rollover. You/your parents/your spouse received money from an IRA, pension or annuity.
- The IRA, pension or annuity was a rollover to a **Roth IRA**. You/your parents/your spouse transferred money from a traditional IRA to a Roth IRA.

Note: If you/your parents/your spouse rolled over a traditional IRA into a Roth IRA, the amount rolled over is reported as taxable income on the tax return. You can complete a "Request for Special Consideration" form to reduce the income and taxes paid due to the rollover.

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

If the student is a dependent, at least one parent must sign.

By signing this form, I/we certify that all of the information reported on this form is complete and correct.

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____

Signatures must be handwritten; digital signatures not accepted.

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