

## Office of Financial Aid

### Verification of 2023 Untaxed Rollover and/or Pension

Student Legal Name (First & Last)

Lewis & Clark ID

Student Email Address

To determine the amount of your 2023 untaxed Pension/IRA income, review the 2023 federal 1040 Form(s) – *line 4a minus 4b AND line 5a minus 5b* for all parent contributors on the FAFSA. Select only ONE option below, and submit your completed form to the Financial Aid Office.

OPTION 1: If the income was a 'ROLLOVER' check the box in option 1 below, and report the amount of the rollover.

OPTION 2: If the income was a distribution of untaxed income that you received, check the box in option 2 below.

#### Option 1 - IRA/Pension ROLLOVER

I reviewed 2023 IRS Form 1040 – line 4a minus 4b AND line 5a minus 5b as well as IRS Form 5498, as applicable. I confirm the amount reported was a 'ROLLOVER' into another IRA or qualified plan.

The total amount of the 2023 'ROLLOVER' was: \$ \_\_\_\_\_

OR

#### Option 2 - IRA/Pension Distribution

I reviewed 2023 IRS Form 1040 – line 4a minus 4b AND line 5a minus 5b. I confirm the amount reported was NOT a 'rollover' into another IRA or qualified plan. It was a distribution of untaxed income I/we received.

By signing this form, I certify that all the information reported is complete and correct. I understand that if I purposely give false or misleading information, I may be fined, sent to prison, or both.

TYPED/DIGITAL SIGNATURES ARE NOT ACCEPTABLE

Student Signature

Date

Parent Signature

Date

- **INCOMING Students:** Upload completed, signed/dated form to our secured [LC Portal](#)
- **CONTINUING Students:** Upload completed, signed/dated form to our secured [FA Document Portal](#)

For additional information about federal verification, visit: [go.lclark.edu/verification](http://go.lclark.edu/verification)