



"The mission of Tri-County Community College is to engage students in learning, help students succeed, and enrich the communities we serve."

Financial Aid Office
21 Campus Circle
Murphy, NC 28906

2022-2023 Verification of Untaxed IRA/Pension and Annuity

This information is being requested because the U.S. Department of Education would like to verify if the amount of untaxed IRA/Pension and annuity listed on your 2022-2023 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 qualified retirement plan. A "rollover" is a tax-free distribution of cash or other assets switched from one retirement plan to another.

INSTRUCTIONS:

**Please indicate whose information is being reported on this form: ___Student's ___Parent's ___Spouse

Please refer to your/your parent's 2020 Federal Tax Return and enter the amounts from the appropriate lines on the table below. Specify if all or some of the untaxed distribution was reinvested in another qualified retirement plan or IRA.

IRA Distributions/Pensions and Annuities

Distribution Type	Total Amount (IRS Form 1040 line 4a)	Taxable Amount (IRS Form 1040 line 4b)	Untaxed Amount (Total minus Taxable)	Amount of Distributions Reinvested (Rollover)
IRA Distribution(s)	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> All <input type="checkbox"/> Some \$ _____
Distribution Type	Total Amount (IRS Form 1040 line 4c)	Taxable Amount (IRS Form 1040 line 4d)	Untaxed Amount (Total minus Taxable)	Amount of Distributions Reinvested (Rollover)
Pension and Annuity Distribution(s)	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> All <input type="checkbox"/> Some \$ _____

****Please provide documentation from the financial institution handling the investment to show the amount reinvested or attach your/your parent's 2020 1099-R.**

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

Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent (if dependent) whose information was reported on the FAFSA must sign and date.

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

Print Student's Name

Student's ID Number

Student's Signature (Required)

Date

Parent's Signature (Required if Dependent Student)

Date