

## Office of Financial Aid

### Verification of 2022 Untaxed Rollover and/or Pension

Student Legal Name (First & Last)

Lewis & Clark ID

Student Email Address

We are required to collect information to verify the untaxed IRA/Pension income reported in the parent section of the 2024/25 FAFSA. Review 2022 federal 1040 Form(s) – line 4a minus 4b & line 5a minus 5b for all parent contributors on the FAFSA to determine the nature of the income reported. To complete this form: Check the box under Option 1 if the income was a ‘ROLLOVER’ and report the amount below OR Check the box under Option 2 if the income was a distribution of untaxed income you received. Submit the completed, signed/dated form to the Financial Aid Office.

#### Option 1 - IRA/Pension ROLLOVER

I reviewed 2022 IRS Form 1040 – line 4a minus 4b and/or line 5a minus 5b. I confirm the amount reported was a ‘ROLLOVER’ into another IRA or qualified plan.

The total amount of the 2022 ‘ROLLOVER’ was: \$ \_\_\_\_\_

OR

#### Option 2 - IRA/Pension Distribution

I reviewed 2022 IRS Form 1040 – line 4a minus 4b and/or 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)