



Beaufort County Community College

Office of Financial Aid

5337 Highway 264 East Washington, NC 27889

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2019-2020

Confirmation of Pension & Annuity Rollover

Student Name: _____ Student ID: _____

The Department of Education has identified a non-zero amount transferred into the untaxed pension or IRA distribution field reported on your FAFSA. The reported rollover amount has been subtracted from the IRA or Pension distribution that was transferred from the IRS. The result was used in the calculation of your expected family contribution (EFC). Please complete this form if all or some of your or your parent(s) IRA or Pension has been rolled over (or your spouse's if you are married), and the rolled over amount is showing on your 2019-2020 FAFSA as untaxed IRS distributions or untaxed pensions.

Please complete the section below to certify that this information is correct.

Yes, I certify that the untaxed pension or IRA distribution transferred from the IRS contained a rollover.

No, I certify that the untaxed pension or IRA distribution transferred from the IRS did not contain a rollover.

Certification and Signatures

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

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

Student Signature

Date

Parent Signature

Date