

Rollover Verification Statement 2023-2024

University of Rochester Financial Aid Office

The FAFSA submitted for the 2023-2024 academic year indicates that an IRS rollover was reported on your parents' 2021 federal tax return. Please confirm below the amount of the IRS-authorized rollover amount reported on the return.

For your reference, a rollover is described as the following:

Untaxed portions of IRA distributions are reported as lines 4a minus 4b on the IRS 1040. Untaxed portions of pensions and annuities are reported as lines 5a minus 5b on the IRS 1040. Sometimes, these amounts are "rolled over" into another qualified IRA, pension, or annuity plan, so these rollover amounts are not actually received as untaxed income. The rollover amount is verified and subtracted from the untaxed IRA distribution amount or untaxed pension and annuity distribution amount, as applicable. The rollover amount cannot be a negative number.

SECTION A:

UNIVERSITY OF ROCHESTER STUDENT INFORMATION

Student Name _____

UR Student ID _____

SECTION B:

PLEASE PROVIDE THE FOLLOWING:

\$ _____ Total rollover amount as reported on the 2021 federal tax return.

I certify that **ALL** of the information on this form is complete and correct:

Student Signature: _____

Date: _____

Parent Signature: _____

Date: _____

www.rochester.edu/financial-aid

Financial Aid Office, Box 270261, Rochester, NY 14627

Phone: (585)275-3226

Fax: (585)756-7664