

STUDENT UNTAXED INCOME ROLLOVER CLARIFICATION FORM

2022-2023 ACADEMIC YEAR

Student's Name: _____

UCF ID: _____

Address: _____

Date: _____

City: _____

State/Zip: _____

Please review your 2020 Tax Return, Form 1040 and provide the amounts of the lines:

Line(s) (4a + 5a) \$ _____ **IRA / Pension Distributions**

minus Line(s) (4b + 5b) \$ _____ **Taxable Amount**

= \$ _____

Was the above amount(s) reinvested/rollover into another retirement account? Yes No

If answered yes, a copy of the 1st page of the 2020 tax return that includes the word "Rollover" must be submitted or a copy of the 1099 R Form that reflects the distribution and/or rollover. If the form is not provided or indicating rollover, the amount will be considered untaxed income.

By signing this form, I certify that the information provided on this form is complete and correct to the best of my knowledge.

Student Signature: _____

Date: _____

Spouse Signature, if married: _____

Date: _____

* By purposely giving false or misleading information, you may be fined, sent to prison, or both.

Submit complete forms at finaid.ucf.edu/upload. Route this form to Verification / Taxes / Identity & Statement of Educational Purpose

Phone: 407.823.2827 • Fax: 407.823.5241 • Web: finaid.ucf.edu | A Division of Student Success and Well-being