



## Federal Verification – IRA/Pension Rollover Documentation Form

### Student information

\_\_\_\_\_  
Last name                                      First name                                      Middle initial                                      Cornell ID Number (or applicant ID number)

\_\_\_\_\_  
Address                                      City                                      State                                      ZIP                                      Phone Number

Distributions from pensions, annuities, and other similar accounts are usually reported to you on IRS Form 1099-R. Federal regulations state that if you receive a lump-sum distribution, you can roll over the distribution into another qualified retirement plan or IRA and retain the tax-deferred status.

Please complete this form if all or some of an IRA or Pension has been rolled over. Untaxed IRA distributions are calculated using the difference between lines 15a and 15b of IRS form 1040 or lines 11a and 11b of IRS form 1040A. Untaxed pension/annuity distributions are calculated using the difference between lines 16a and 16b of IRS form 1040 or lines 12a and 12b of IRS form 1040A. Please review your individual tax return, complete the table below, and send the completed form to our office.

Distribution Type	Total Amount	Taxable Amount	Untaxed Amount	Amount of Untaxed Portion Reinvested
IRA Distribution(s)	\$	\$	\$	\$
Pension/Annuity Distribution(s)	\$	\$	\$	\$

### Certification statement

By signing, I certify that all information reported is complete and accurate.

\_\_\_\_\_  
Student Signature (required for independent students)      Date

\_\_\_\_\_  
Parent Signature (required for dependent students)      Date