

Student Information (Please Print)

Student's Last Name	Student's First Name	Student's M.I.	Student's CPCC Student ID#
Student's Street Address (include apt. no.)			Student's CPCC Email Address
City	State	Zip Code	Student's Telephone # (include area code)

Warning: According to the U.S. Department of Education, if you purposely give false or misleading information, you may be subject to a fine of up to \$20,000 or imprisonment for up to 5 years, or both.

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 2019-20 FAFSA as untaxed IRS distributions or untaxed pensions.

Federal Regulations state that if you receive a lump-sum distribution from a pension, annuity, profit-sharing or retirement plan, IRA, Insurance contract, etc., you can roll over the distribution into another qualified retirement plan or IRA and keep it in a tax-deferred status. These rolled over funds should not be reported on the FAFSA as untaxed income, however if you used the IRS Data Retrieval when completing the FAFSA, the retrieval tool would not recognize the rollover.

Untaxed IRA distributions may be calculated using:

IRS Form 1040 (line 15a minus 15b) or
IRS Form 1040A (line 11a minus 11b) .

Untaxed Pensions and Annuities distributions may be calculated using:

IRS Form 1040 (line 15a minus 15b) or
IRS Form 1040A (line 11a minus 11b).

Please review your individual tax return, indicate if all or some of the distribution was reinvested, attach the documents showing the rollover, then sign and date and either fax this and supporting documentation to (704) 330-5053, mail it to the address listed below, or submit in person to a CPCC financial aid office location.



Please attach documentation from the financial institution handling the investment to show the amount reinvested or attach your 1099-R for 2017.

Type of Distribution on Tax Return	Total Amount	Taxable Amount	Untaxed Amount	Amount of Distributions Reinvested
IRA Distributions	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> All <input type="checkbox"/> Some \$ _____
Pensions and Annuities	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> All <input type="checkbox"/> Some \$ _____

Certification and Signature

Please provide your signature. If you are a dependent student, please also provide one parent's signature whose information is listed on your FAFSA. By providing signature(s), you are certifying that all of the information on this form is complete and correct. You are also authorizing Central Piedmont Community College to make corrections to your original and/or subsequent applications based on the documents you are now submitting.

Student Signature:

Date:

Parent Signature (Dependent Students Only):

Date: