

2018 Student Rollover Tax Information

Your 2020-2021 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law requires that before awarding Federal Student Aid, we confirm the tax information you reported on the FAFSA. The instructions below will assist in the tax verification process. Please submit the required documents within 30 days of this request. If there are discrepancies between the data on your FAFSA and the information on the IRS Tax Return Transcript, your FAFSA may need to be corrected.

Important Note: The instructions below apply to the student and spouse, if married.

You indicated on the FAFSA that funds from the IRS Data Retrieval Tool were transferred to Untaxed Portions of IRA Distributions or the Untaxed Portions of Pensions and the amount includes a rollover.

We are required to collect one of the following to verify the information:

- A signed and dated written statement from the tax filer indicating the IRS-authorized rollover amount; or
- A copy of the Tax Return Transcript or alternative tax transcript signed and dated with the word "Rollover" handwritten next to the applicable line items.

IRS Tax Return Transcript

You can request the 2018 IRS Tax Return Transcript free of charge using one of these options:

Online: Go to www.irs.gov, click **Get Your Tax Record** and select **Get Transcript Online** or **Get Transcript by Mail**. Make sure to request the **IRS Tax Return Transcript** and **not** the IRS Tax Account Transcript.

IRS2Go App:

Apple Online Store: <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>

Google Play: <https://play.google.com/store/apps/details?id=gov.irs>

Download App, Select Tax Records, Return Transcript, 2018

Telephone: 1.800.908.9946, Enter SSN, Street Address Numbers, Enter 2018 for Tax Year