



## 2022-2023 IRA and/or Pension Rollovers Questionnaire – Independent Student

Student's Name (PRINT): \_\_\_\_\_ HCCC ID: \_\_\_\_\_ Phone: (\_\_\_\_) - \_\_\_\_\_

The Data Retrieval Tool (DRT) does not exclude tax return IRA and/or Pension Distribution Rollovers from untaxed income. The DRT will include an IRA and/or Pension Distribution Rollover in your untaxed income on the FAFSA. This may result in a higher Expected Family Contribution (EFC) and decrease in your financial need.

Do you have a 2020 IRA or Pensions Rollover?

Yes

No

If your answer is **YES**, sign this form and provide the following supporting documents to HCCC Financial Aid Office

- 1) A written notice/request for correction to your FAFSA Untaxed IRA and/or Pension Rollover
- 2) A copy of Page 1 of your Federal 2020 IRS Income Tax Return
- 3) A copy of IRS Form 1099 from the organization the IRA or Pension was rolled into.

If your answer is **NO**, sign this form and submit to us.

Student Signature \_\_\_\_\_

Date: \_\_\_\_\_