



## 2023-2024 IRA and/or Pension Rollovers Questionnaire (Dependent)

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 or your parents have a 2021 IRA or Pensions Rollover

Yes

No

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

- 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 2021 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: \_\_\_\_\_

Parent Signature \_\_\_\_\_  
(Dependent Student)

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