Barnard College
Verification of Rollover Form

A Rollover occurs when you withdraw cash or assets from one eligible retirement plan and contribute all or part of it, within 60 days, to another eligible retirement plan. This Rollover transaction is not taxable, unless the rollover is to a Roth IRA, but it is reportable on your federal tax return.

In most cases, a Rollover happens when you move a prior employer-sponsored account to another plan with a different employer, or move the funds to an individual retirement account.

Your tax return indicates that you have a Rollover. Please complete this form to confirm non-taxable Rollover transactions reported on line 4a of your federal tax return.

Student Name: ________________________________

Parent Name: ________________________________

Tax Year: __________________

Rollover Amount: ______________________________

Name(s) of Tax Filer(s): ___________________________ _________________________________

By signing this form I certify that the information reported above is accurate and complete.

Parent Signature: ______________________________ Date: ______________________________