



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:** _____