



SRO24

2023-2024
Student/Spouse Verification of IRA and/or
Pension Rollovers

Please Use Black or Blue Ink

Student Legal Name:

OSU Student ID
("A" plus 8 digits)
A

The OSU Office of Scholarships and Financial Aid must, by federal regulations, verify the student/spouse information on the 2023-2024 Free Application for Federal Student Aid (FAFSA). We cannot determine aid eligibility or disburse funds until all requested documents are received and reviewed.

Untaxed Income and Rollovers:

The difference between the total amount of pensions, annuities and IRA distributions received during a calendar year and the taxable portion is considered untaxed income for financial aid purposes. Transfer of funds from one account to another (rollover) can be excluded.

Do not leave an answer blank. If the response is zero, check the "None" box.

Table with 3 columns: Calendar Year 2021, Student/Spouse Rollover Amount, and None. Rows include IRA distribution and pension/annuity distribution amounts for 2021.

Certification/Signature:

By signing this form, I certify that all the information reported to qualify for federal student aid is complete and correct. If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature (Stylus or ink pen only)

Date

Return to:
Office of Scholarships and Financial Aid
119 Student Union, Stillwater, OK 74078-5061
Fax: (405) 744-6438 (if you fax, please do not mail the form)

Questions?
Email: finaid@okstate.edu
Phone: (405) 744-6604
Web: financialaid.okstate.edu