

**PRO27****2026-2027****Contributor (Parent) Verification of IRA and/or Pension Rollovers***Please Use Black or Blue Ink*

Student Legal Name:

AOSU Student ID
("A" plus 8 digits)

The OSU Office of Scholarships and Financial Aid must, by federal regulations, verify the contributor (parent) information on the 2026-2027 Free Application for Federal Student Aid (FAFSA). **We cannot determine aid eligibility or disburse funds until all requested documents are received and reviewed.** In some cases, we must submit changes in information to the U.S. Department of Education (FAFSA processor); at that time, the student will receive communication from our office as well as a FAFSA Submission Summary from the FAFSA processor.

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.

Calendar Year 2024	Parent(s)	
	Rollover Amount	None
Of the total IRA distribution from IRS Form 1040 (lines 4a minus 4b), list the amount that was rolled over in tax year 2024:	\$ _____/yr	☐
Of the total pension, annuity distribution from IRS Form 1040 (lines 5a minus 5b), list the amount that was rolled over in tax year 2024:	\$ _____/yr	☐

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.**

Contributor's (Parent's) Signature *(Stylus or ink pen only)*

Date

Printed Legal Name of (Contributor) Parent Who Signed Above

Street Address

City

State

Zip

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