

**SRO27****2026-2027****Student/Contributor (Spouse) 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 student/contributor (spouse) 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, you 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	Student/Contributor (Spouse)	
	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.**

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