

## 2018-2019 Parent Verification of IRA and/or Pension Rollovers

| Please Use Black or Blue Ink | <b>OSU Banner ID</b><br>("A" plus 8 digits) |  |  |  |  |  |  |  |  |
|------------------------------|---|--|--|--|--|--|--|--|--|
| Student Name:                | Α   |  |  |  |  |  |  |  |  |

The OSU Office of Scholarships and Financial Aid must, by federal regulations, verify the parent information on the 2018-2019 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 Student Aid Report 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.   |                 |      |  |  |  |  |  |  |  |
|--|-----------------|------|--|--|--|--|--|--|--|
| Colordor Veer 2016   | Parent(s)       | )    |  |  |  |  |  |  |  |
| Calendar Year 2016   | Rollover Amount | None |  |  |  |  |  |  |  |
| Of the total <b>IRA distribution</b> from IRS Form 1040 (lines 15a minus 15b) or 1040A (lines 11 minus 11b), <b>list the amount that was rolled over in tax year 2016:</b>               | \$/yr           |      |  |  |  |  |  |  |  |
| Of the total <b>pension, annuity distribution</b> from IRS Form 1040 (lines 16a minus 16b) or 1040A (lines 12a minus 12b), <b>list the amount that was rolled over in tax year 2016:</b> | \$/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.

 Parent's Signature (electronic signature not acceptable)
 Date

 Printed Name of 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: <u>finaid@okstate.edu</u> Phone: (405) 744-6604 Web: <u>financialaid.okstate.edu</u>

Oklahoma State University, in compliance with the Title VI and VII of the Civil Rights Act of 1964, Executive Order 11246 as amended, Title IX of the Education Amendments of 1972, Americans with Disabilities Act of 1990, and other federal laws and regulations, does not discriminate on the basis of race, color, national origin, sex, age, religion, disability or status as a veteran in any of its policies, practices or procedures. This includes but is not limited to admissions, employment, financial aid and educational services. Title IX of the Education Amendments and Oklahoma State University policy prohibit discrimination in the provision or services or benefits offered by the university based on gender. [G:(18-19)forms)pro19.doc Rev 1/18]