



**2019-2020
Parent Verification of IRA and/or
Pension Rollovers**

PRO20

Please Use Black or Blue Ink

Student Name:

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

The OSU Office of Scholarships and Financial Aid must, by federal regulations, verify the parent information on the 2019-2020 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.

Calendar Year 2017	Parent(s)	
	Rollover Amount	None
Of the total IRA distribution from IRS Form 1040 (lines 15a minus 15b) or 1040A (lines 11 minus 11b), list the amount that was rolled over in tax year 2017:	\$ _____ /yr	<input type="checkbox"/>
Of the total pension, annuity distribution from IRS Form 1040 (lines 16a minus 16b) or 1040A (lines 12a minus 12b), list the amount that was rolled over in tax year 2017:	\$ _____ /yr	<input type="checkbox"/>

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: finaid@okstate.edu

Phone: (405) 744-6604

Web: financialaid.okstate.edu