

IRA or Pension Rollover Verification Worksheet 2026-2027



Financial Aid Office
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Please allow at least 2 weeks for processing after all required documents have been submitted. Documents submitted between July 1, 2026 and August 31, 2026 may take longer to process.

Carefully read the instructions and provide the information asked. Please note, we may ask for additional information after the documents are reviewed.

Student's Name _____ Student's WIN _____

At least one contributor (student, student spouse, parent, parent spouse) reported an IRA and/or Pension Rollover on the 2026-27 FAFSA:

- List the contributor whose rollover it is, the type of each rollover in 2024, the amount of each rollover, and provide a copy of the 2024 1099-R from each rollover (if there were no rollovers, list "none" under type and "\$0" under amount earned)

Name of Contributor who reported a rollover	Type of Rollover (IRA or Pension)	2024 Rollover Amount	IRS 1099-R Form Provided?

My signature below affirms that these amounts were rolled over into a qualified retirement account.

The student and each contributor listed above are required to provide signatures on this form. Typed or digital font signatures cannot be accepted.

Certification and Signature

By signing this worksheet, you certify that all of the information reported on it is complete and correct. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

_____ Student Signature	_____ Date
_____ Contributor Signature	_____ Contributor Name
	_____ Date