



**2023-24 Verification – 2021 IRA/Pension Rollover  
Dependent/Independent Student**

Office of Student Financial Services - One University Ave - Bourbonnais, IL 60914  
Phone: (815) 939-5245 Fax: (815) 939-5074 Email: studentfinance@olivet.edu

Your Free Application for Federal Student Aid (FAFSA) was selected for review in a process called “Verification.” Complete this verification form and submit it to the Office of Student Financial Services as soon as possible so that your financial aid is not delayed. Please be aware that your financial aid eligibility may change based on verification.

ONU ID # or SSN \_\_\_\_\_ Date of Birth \_\_\_\_\_ Phone \_\_\_\_\_

Student Name \_\_\_\_\_  
*Last First M.I.*

Student Address \_\_\_\_\_  
*Street (include apartment #) City State ZIP Code*

You or another family member listed on your 2023-24 FAFSA had Untaxed IRA/Pension amount(s) reported from the IRS during 2021. Please enter the amount of the Untaxed IRA/Pension that was a rollover in the box(es) below and provide the required signature(s).

**Do NOT leave any box blank. Enter ‘0’ in any box that does not apply.**

<b>2021 Untaxed IRA/Pension</b>	<b>Student &amp; Spouse</b>	<b>Parent(s)</b>
Amount of untaxed portions of IRA distributions from 2021 IRS form 1040 (line 4a minus 4b) <b>that was a Rollover</b>	\$	\$
Amount of untaxed portions of Pension/Annuity distributions from 2021 IRS form 1040 (line 5a minus 5b) <b>that was a Rollover</b>	\$	\$

**\*\*Please submit a copy of all 2021 1099-R Forms with this verification form.\*\***

**Check here if the 2021 Untaxed IRA/Pension amount listed on the 2023-24 FAFSA was a normal distribution (such as a recurring distribution from a Roth IRA) and not a rollover.**

Enter the amount of your IRA/Pension rollover as reported on your 2021 federal tax return in the appropriate box(es) above. If you are unsure of the amount of the rollover portion, you may have received a 1099-R form or other tax-related document(s) from the account administrator that would include this information. If you used an accountant to file your 2021 federal tax return, they may also be able to help you determine if and how much of your untaxed IRA/Pension amount was a rollover.

*I certify that ALL of the information on this form is complete and correct:*

Student Signature (Required) \_\_\_\_\_ Date \_\_\_\_\_

Parent Signature (Required for dependent students) \_\_\_\_\_ Date \_\_\_\_\_

**(Typed signatures will NOT be accepted.)**

**WARNING: If you purposely give false or misleading information on this form, you may be fined, sentenced to jail, or both. If we have reason to believe that the information on this form is not accurate, we may require additional documentation.**