



2025-26 Verification – 2023 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 2025-26 FAFSA had Untaxed IRA/Pension amount(s) reported from the IRS during 2023. 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.

Table with 3 columns: 2023 Untaxed IRA/Pension, Student & Spouse, Parent(s). Rows include untaxed portions of IRA distributions and Pension/Annuity distributions from 2023 IRS form 1040 that were rollovers.

\*\*Please submit a copy of all 2023 1099-R Forms with this verification form.\*\*

Check here if the 2023 Untaxed IRA/Pension amount listed on the 2025-26 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 2023 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 2023 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.