FRAMINGHAM STATE UNIVERSITY

VERIFICATION OF ROLLOVER
2027-2028 Academic Year

Student Name: _____ ID #: _____

We are requesting this form because either the Parent or Student reported an IRS or Pension Rollover on the FAFSA. Complete the form using your 2025 federal tax return and submit to the Financial Aid Office.

The information submitted is for the: **Student _____** **Student's Parent _____**

PART 1: IRA DISTRIBUTIONS

Enter the amount from IRS Form 1040, Line 4a (IRA distributions) $ _____

Enter the amount from IRS Form 1040, Line 4b (taxable amount) $ _____

Was this IRA distribution a rollover? (Yes/No) _____

If Yes, what amount was a rollover into another qualified retirement plan? $ _____

PART 2: PENSION/ANNUITY DISTRIBUTIONS

Enter the amount from IRS Form 1040, Line 5a (pension/annuity distributions) $ _____

Enter the amount from IRS Form 1040, Line 5b (taxable amount) $ _____

Was this pension/annuity distribution a rollover? (Yes/No) _____

If Yes, what amount was a rollover into another qualified retirement plan?) $ _____

PART 3: CERTIFICATION AND SIGNATURE

Each person signing below certifies that the information on this form is complete and correct. **Digital signatures are not accepted.**

Signature of the Tax Filer with the Rollover: _____

Date: _____

Return this completed form to:

Financial Aid Office · Framingham State University · McCarthy Center, 5th Floor · 100 State Street
Framingham, MA 01701 · Phone: (508) 626-4534 · Fax: (508) 626-4598 financialaid@framingham.edu