



**WORCESTER**  
S T A T E  
**UNIVERSITY**

Financial Aid  
Phone: 508-929-8056  
Fax: 508-929-8194

NAME: \_\_\_\_\_  
\_\_\_\_\_  
ID#: \_\_\_\_\_

FAC20RLV

**2020/2021  
ROLLOVER VERIFICATION FORM**

You are being asked to complete this form because you have indicated to us that a rollover retirement contribution is reported on the 2020-21 FAFSA. In order for these funds to be excluded from your expected family contribution, the Financial Aid Office will require the documents listed in Section 1 to confirm the amount of the rollover.

**SECTION 1**

Please remit the completed form to the Financial Aid Office with one of the following supporting documents:

1. IRS Form 1099-R (Box 7 must show code "G") and IRS Form 5498 (Box 2 should show rollover amount)
2. Copy of 1040 with rollover noted on line 4

**SECTION 2**

UNTAXED INCOME TYPE	AMOUNT
Amount of untaxed portion of IRA, Pension, and Annuity distributions from 2018 IRS form 1040 (line 4) that was rolled over:	\$

**I certify that the above information is complete and correct. Do not leave any blanks. If not complete this form will be returned to you.**

SIGNATURE (student) \_\_\_\_\_ DATE: \_\_\_\_\_

SIGNATURE (parent) \_\_\_\_\_ DATE: \_\_\_\_\_