WPI | Office of Financial Aid

100 Institute Road, Worcester MA 01609
(508) 831-5469

Please submit this form to finaid@wpi.edu.

Rollover Verification Form

Student Name: _____

WPI ID: _____

Your 2027-2028 FAFSA indicated an amount of untaxed IRA or pension/annuity distributions received in 2025. The untaxed portion of an IRA or pension/annuity distribution must be reported as untaxed income on the FAFSA *unless* it was rolled over into another qualified retirement plan. Indications of a rollover are not transferred via Direct Data Exchange (FA-DDX) with the IRS. Please complete this form if some or all of an IRA, pension, or annuity was rolled over in 2025.

Use your 2025 1040 tax return for the items below. Enter "0" for any item that does not apply.

For IRA distributions:

1. Enter the amount from IRS Form 1040 Line 4a (IRA distributions) $_____
2. Enter the amount from IRS Form 1040 Line 4b (taxable amount) $_____
3. Was this IRA distribution a rollover? (Yes/No) _____
    a. If yes, what amount was a rollover into another qualified retirement plan? $_____

For Pension/Annuity distributions:

1. Enter the amount from IRS Form 1040 Line 5a (pension/annuity distributions) $_____
2. Enter the amount from IRS Form 1040 Line 5b (taxable amount) $_____
3. Was this pension/annuity distribution a rollover? (Yes/No) _____
    a. If yes, what amount was a rollover into another qualified retirement plan? $_____

Certification and Signature

I certify that all the information reported is complete and correct.
Intentionally giving false or misleading information may result in fines, imprisonment, or both.

Signatures cannot be typed.

_____ _____

Signature of Tax Filer with Rollover (Required) Date