



LAKE FOREST
COLLEGE

2023 - 2024 Verification Worksheet V1 - Independent Student

Your financial aid application (FAFSA) was selected for review called "verification," so additional information is required to determine your official eligibility. **You must complete, sign and return this Worksheet to our office, and include all required documents.** If you have questions, please contact us as soon as possible so that your financial aid will not be delayed.

Please Print

Student's Name: _____ Lake Forest ID# or Last four of SSN: _____

I am a new student at Lake Forest I am a returning student at Lake Forest

➤ Step 1: Your Current Marital Status: Married Single Divorced/Separated Widowed

➤ Step 2: "Household" Definitions and Instructions

In Step 3, beginning with you (the student) provide the names, ages, etc. of all people in your household, meeting this definition. If you need more space, attach a separate page with the student's name and last four digits of SSN or full ID at the top.

- ✓ **Your spouse**, if married
- ✓ **Your children** (if any) if you will provide more than half of their support from July 1, 2023 through June 30, 2024, or if the child would be required to provide your information if they were completing a FAFSA for the 2023–2024 academic year. Include children who meet either of these standards, even if they do not live with you.
- ✓ **Other People** if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support **through June 30, 2024**.

Next, in Step 3, include college information for any household member who will be enrolled, at least half-time in a degree, diploma, or certificate program at a postsecondary educational institution any time **between July 1, 2023 and June 30, 2024**.

➤ Step 3: Family / Household Information, as defined in Step 2.

Name of Family Member	Age	Relation to the Student	Name of College Attending between July 2023 – June 2024	Enrolled at Least Half-Time?	Year in College
1.		Self	Lake Forest College	<u>Yes</u> No	
2.				Yes No	
3.				Yes No	
4.				Yes No	
5.				Yes No	
6.				Yes No	
7.					
8.					
9.					
10.					

➤ Instructions for Steps 4 and 5: 2021 Income Information

There are two ways to document your income.

- **Best:** use the IRS Data Retrieval Tool (DRT) to update the FAFSA; go to lakeforest.edu/fafsa and see "Helpful Tools."
- Send a Tax Return Transcript (**not Tax Account Transcript**) from irs.gov/Individuals/Get-Transcript and choose "Get Transcript Online".
- **If you did not file** and are not required to file, check the third or fourth box below and provide any necessary, additional information.

You cannot use the DRT if: ① you are married and filed separate tax returns, ② you are married and filed as "head of household", ③ your marital status changed after filing the return, ④ you filed using an ITIN (not SSN), or ⑤ you filed a foreign return.

If you filed an amended return, include a signed copy of IRS 1040X along with the original 1040 or tax transcript.

➤ Step 4: Student's 2021 Income Information

➤ Check **ONLY ONE** box below. Complete "employer information" in the table below only if you check the third box.

- I filed a 2021 tax return and have used or will use the IRS DRT to transfer my tax information into the FAFSA.
- I filed a 2021 tax return and will provide a Tax Return Transcript ... now later sent previously
- I **did not** file a 2021 tax return, but I **was employed**, with income from the employers listed below. Include W-2s, 1099s, etc.
- I **did not** file a 2021 tax return because I **was not employed** in 2021.

Employer's Name	2021 Amount Earned	Was a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No

➤ Step 5: Spouse's 2021 Income Information (if applicable)

➤ Check **ONLY one** box. Complete "employer information" in the table below only if you check the third box.

- I filed a 2021 federal return with the student as "married." S/he used the IRS DRT to transfer our information to the FAFSA.
- I filed a 2021 tax return and will provide a Tax Return Transcript ... now later sent previously
- I **did not** file a 2021 tax return, but I **was employed**, with income from the employers listed below. Include W-2s, 1099s, etc.
- I **did not** file a 2021 tax return because I **was not employed** in 2021.

Employer's Name	2021 Amount Earned	Was a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No

➤ Step 6: Signatures

All information is true & complete to the best of my knowledge. I agree to provide any documentation that will verify the accuracy of this information. I understand that if I purposely give false or misleading information, I may be fined up to \$20,000, sent to prison, or both.

Student's Signature – we cannot accept a typed signature

Date

Spouse's Signature – we cannot accept a typed signature

Date

➤➤ If possible, please send this Worksheet as a .pdf to the email address below. You may also fax or mail it. <<
Include all applicable supporting documents, such as Tax Return Transcript, W-2s, 1099s, IRS Form 4506, etc.

Office of Financial Aid ♦ 555 North Sheridan Road ♦ Lake Forest Illinois 60045-2338
lakeforest.edu/finaid ♦ finaid@lakeforest.edu ♦ Phone & Fax: 847-735-5103