



LAKE FOREST COLLEGE

Your financial aid application (FAFSA) was selected for review called "verification." Additional information is required to determine your official eligibility. You and one parent must complete and sign this Worksheet, and return it to us along with all required documents. If you have questions, please contact us as soon as possible (see bottom of page 2) 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

Parent Completing this Form: _____

Parent's Daytime Phone: (_____) _____ - _____ Parent's E-Mail: _____

➤ Step 1: Who Provides Information on this Worksheet?

- ✓ If - *as of today*- your parents are both living and married to each other, **or** if they are "unmarried and living together", base your answers on both parents.
- ✓ If - *as of today*- your parent is widowed or single, base your answers on that parent alone.
- ✓ If your parent you live with is - *as of today* - **remarried**, you must include information for both parent **and** stepparent.
- ✓ If your parents are - *as of today*- divorced or separated, base your answers on the one you lived with **most** during the last 12 months. If you lived with both parents equally, base your answers on the parent who provided more financial support in the last year.

➤ Step 2: Parent's Current Status: Married Single Divorced/Separated Widowed Unmarried living together

➤ Step 3: "Household" Definitions and Instructions

First, in Step 4 below, list all people in your parent's household, who meet this definition:

- ✓ You (the student)
- ✓ Your parent(s) -*including a stepparent*- even if you don't live with your parent(s). See **Step 1** above for parent(s) to include.
- ✓ Your parent's/parents' other children, if your parent(s) will provide more than half of their support from **July 1, 2021 to June 30, 2022** **or** if the other children would be required to provide parental information if they were completing a FAFSA for the 2021-2022 academic year. Include children who meet either of these standards, even if they do not live with your parent(s).
- ✓ Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support **through June 30, 2022**.

Next, in Step 4, 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, 2021 and June 30, 2022**.

If more space is needed, attach a separate page with the student's name and Social Security Number (last four digits) or ID at the top.

➤ Step 4: Family / Household Information, as defined in Step 3.

Name of Family Member	Age	Relation to the Student	Name of College Attending between July 2021 - June 2022	Enrolled at Least Half-Time?		Year in College
1.		Self	Lake Forest	Yes	No	
2.				Yes	No	
3.				Yes	No	
4.				Yes	No	
5.				Yes	No	
6.				Yes	No	
7.				Yes	No	
8.				Yes	No	

Office Use Scanned Data Entry Done Doc'n Complete Yes No If "no" family notified ___/___ Initials/Date: _____

Notes:

NEW RETG

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

➤ Instructions for Steps 5 and 6: 2019 Income Information

If you filed a 2019 tax return, we strongly encourage you to use the IRS Data Retrieval Tool (DRT) to update the FAFSA; go to lakeforest.edu/fafsa and see **Helpful Tools** in the lower portion of the page. **Alternatives:** send a signed copy of the 2019 federal tax return or a *Tax Return Transcript*, irs.gov/Individuals/Get-Transcript ("Request Online" gives immediate access) or call 800-908-9946.

If you did not file a tax return and are not required to file, check the box that applies to your situation, and – if appropriate – list each employer along with the amount earned. Attach a separate page if needed.

You cannot use the DRT if: you are married and filed separate tax returns, you are married and filed as "head of household", filed an amended return, your parents' marital status is "unmarried and both legal parents living together", your marital status changed after filing the return, you filed using an ITIN (not SSN), or you filed a foreign return.

➤ Step 5: Student's 2019 Income Information

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

- I filed a 2019 federal tax return and used the IRS DRT to transfer my tax information into the FAFSA.
- I filed a 2019 federal tax return. I will provide a 2019 Federal Tax Return or Tax Transcript ... now later sent previously
- I **did not** file a 2019 federal tax return, but I was employed, with income from the employers listed below. **Include W-2s.**
- I **did not** file a 2019 federal tax return because I **was not employed** in 2019.

Employer's Name	2019 Amount Earned	Is a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No

➤ Step 6: Parent(s) 2019 Income Information

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

- We/I filed a 2019 federal tax return and used the IRS DRT to transfer tax information to the FAFSA.
- We/I filed a 2019 federal tax return. I will provide a 2019 Federal Tax Return or Tax Transcript now later sent previously
- We/I **did not file** a 2019 federal tax return, but I **was employed**, with income from the employers listed below. **Include W-2s.**
- We/I **did not file** a 2019 federal tax return because I **was not employed** in 2019.

Employer's Name	2019 Amount Earned	Is a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No

➤ Step 7: Signatures

All information is true and complete to the best of my knowledge. I will 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

Parent'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.

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