LAKE FOREST COLLEGE

# 2014 - 2015 Verification Worksheet
V1

**Please Print**

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

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

Your financial aid application (FAFSA) was selected for review called "verification." As a result, you must confirm information you and your parents reported on the FAFSA before we can determine your official eligibility.

**You and one parent must complete, sign and return this Worksheet to the above address, 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.

## ➢➢ Who Provides Information on this Worksheet? ≺≺

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

## ➢➢ Step 1: Student's Family Information ≺≺

Provide the requested information for **all** people in your parent's household, including:

- ✓ **You** (the student)
- ✓ **Your parent(s)** — *including a stepparent* — even if you don't live with your parent(s)
- ✓ **Your parent's/parents' other children,** if your parent(s) will provide more than half of their support from July 1, 2014, through June 30, 2015, or if the other children would be required to provide parental information if they were completing a FAFSA for 2014–2015. 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, 2015.

**In addition**, include college information for any household member - *excluding your parent(s)* - 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, 2014, and June 30, 2015.

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.

**Parent's Current Marital Status:** ❑ Married ❑ Single ❑ Divorced/Separated ❑ Widowed

| Name of Family Member | Age | Relation to the Student | Name of College Attending between July 2014 – June 2015 | 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 | |
| 9. | | | | Yes No | |
| 10. | | | | Yes No | |

## ➢➢ Instructions for Steps 2 & 3: 2013 Income Information ≺≺

If you filed a 2013 tax return, you can verify your income in one of two ways:

✓ by using the **IRS Data Retrieval Tool (DRT)*** when you submit or correct the FAFSA - www.lakeforest.edu/irsdrt
- not available if you: are married and filed separate tax returns, filed an amended return, or filed a foreign return

✓ by providing our office with a **IRS Tax Return Transcript (TRT)*** - not a Tax Account Transcript - available in one of three ways**:
- www.irs.gov/Individuals/Get-Transcript
- call the IRS at 800-908-9946
- submit IRS Form 4506T-EZ – *www.lakeforest.edu/ofaforms*

* If you are unable to use the DRT and/or the TRT, provide a screen shots from the IRS website and a copy of the IRS statement
** Allow up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If the parents are married, and filed separate 2013 tax returns, a Transcript must be submitted for each parent.

If you did not file a tax return, list every employer even if you did not receive a W-2 form. 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. Attach a copy of each W-2 form you received.

## ➢➢ Step 2: Student's 2013 Income Information ≺≺

**If you (the student) have filed or will file a 2013 IRS tax return, check the box that applies, then skip to Step 3.**

❑ I have used the IRS DRT to transfer my 2013 IRS income information into the FAFSA.

❑ I will use the IRS DRT no later than ____/____/14 to transfer my income information to the FAFSA.

❑ I will submit a 2013 IRS Tax Return Transcript. ❑ Included now ❑ Will send later

**If you (the student) have not and will not file a 2013 IRS tax return, check the box that applies:**

❑ I was not employed and had no income earned from work in 2013.

❑ I was employed in 2013, and earned income from the employers listed below. I have attached a copy of each W-2 form I received.

| Employer's Name | 2013 Amount Earned | Is a W-2 Attached? |
|---|---|---|
| | $ | Yes No |
| | $ | Yes No |
| | $ | Yes No |

## ➢➢ Step 3: Parent(s) 2013 Income Information ≺≺

**If you (the student's parent(s)) have filed or will file a 2013 IRS tax return, check the box that applies, then skip to Step 4.**

❑ I have already used the IRS DRT to transfer 2013 IRS income information into FAFSA.

❑ I will use the IRS DRT no later than ____/____/14 to transfer my income information to the FAFSA.

❑ I will submit a 2013 IRS Tax Return Transcript. ❑ Included now ❑ Will send later

**If you (the student's parent(s)) have not and will not file a 2013 IRS tax return, check the box that applies:**

❑ I was not employed and had no income earned from work in 2013.

❑ I was employed in 2013, and earned income from the employers listed below. I have attached a copy of each W-2 form I received.

| Employer's Name | 2013 Amount Earned | IRS W-2 Attached? |
|---|---|---|
| | $ | Yes No |
| | $ | Yes No |
| | $ | Yes No |
| | $ | Yes No |
| | | |

## ➢➢ Step 4: Parent(s) Other Information ≺≺

❑ Yes ❑ No In 2012 or 2013, did any person listed in **Step 1** receive benefits from the Supplemental Nutrition Assistance Program (SNAP, formerly called food stamps)? If asked by Lake Forest College, please provide documentation of the benefits received.

❑ Yes ❑ No In 2013, did any parent listed in **Step 1** pay child support? **Do not include** support paid for a child also included in **Step 1**. If so, complete the table below. If asked by Lake Forest College, please provide documentation of the payment of child support.

| Person Who Paid Child Support | Person to Whom Child Support was Paid | Child for Whom Support was Paid | Amount Paid In 2013 |
|---|---|---|---|
| | | | $ |
| | | | $ |
| | | | $ |
| | | | $ |

## ➢➢ Step 5: Certification and Signatures ≺≺

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date. **Warning**: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

_____ _____

*Student's Signature* *Date*

_____ _____

*Parent's Signature* *Date*

## ➢➢ Mail, fax or scan this Worksheet to ≺≺

Office of Financial Aid
Lake Forest College
555 N Sheridan Rd
Lake Forest, IL 60045-2338
Fax: 847-735-6271
Email: finaid@lakeforest.edu

Include all applicable supporting documents, including Tax Return Transcript, W-2s, etc.
Make a copy of this Worksheet for your records.

Questions: 847-735-5103 Online at *www.lakeforest.edu/finaid*