



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 your parents are - as of today - both living and married to each other, or if they are "unmarried and living together", base your answers on both parents.
✓ If your parent is - as of today - 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: Student's Family Information

FIRST: 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, 2020 to June 30, 2021 or if the other children would be required to provide parental information if they were completing a FAFSA for the 2020-2021 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, 2021.

NEXT: 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, 2020 and June 30, 2021.

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 Unmarried and living together

Table with 6 columns: Name of Family Member, Age, Relation to the Student, Name of College Attending between July 2020 - June 2021, Enrolled at Least Half-Time?, Year in College. Row 1 is pre-filled with '1.', 'Self', 'Lake Forest', and 'Yes' circled.

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

Notes: _____ NEW RETG

➤ Instructions for Steps 3 & 4: **2018 Income Information**

If you filed a **2018 tax return**, use the IRS Data Retrieval Tool (DRT) to update the FAFSA -lakeforest.edu/fafsa- see **Helpful Tools** on right. **Alternatives:** (1) provide a *Tax Return Transcript*, irs.gov/Individuals/Get-Transcript, 800-908-9946 or (2) a signed copy of your tax return.

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 even if you did not receive a W-2 form. 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 marital status is “unmarried and both legal parents living together”, your marital status changed in 2019, or you filed a foreign return.

➤ Step 3: **Student’s 2018 Income Information**

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

- I filed a 2018 federal tax return and I have used the IRS DRT to transfer my 2018 income information into the FAFSA.
- I filed a 2018 federal tax return and will provide my 2018 IRS Tax Return Transcript included now will provide later
- I did not file a 2018 federal tax return, but I was employed in 2018, earning income from the employers listed below. **Include W-2s.**
- I did not file a 2018 federal tax return because I was not employed in 2018.

Employer’s Name	2018 Amount Earned	Was a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No

➤ Step 4: **Parent(s) 2018 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 2018 federal tax return and have used the IRS DRT to transfer my 2018 income information into the FAFSA.
- We/I filed a 2018 federal tax return and will provide my 2018 IRS Tax Return Transcript included now will provide later
- We/I did not file a 2018 federal tax return, but earned income in 2018 from the employers listed below. **Include W-2s.**
- We/I did not file a 2018 federal tax return because I was not employed in 2018.

Employer’s Name	2018 Amount Earned	IRS W-2 Provided?	
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No

➤ Step 5: **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

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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