



LAKE FOREST
COLLEGE

2022 - 2023 Verification Worksheet

V1

Your financial aid application (FAFSA) was selected for review called "verification" **You and one parent must complete and sign this Worksheet**, and return it to us along with all required documents before we can determine your official eligibility. 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

In **Step 4**, beginning with you (the student) provide the names, ages, etc. of all people in your parent's household, meeting the definition below. 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 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 from **July 1, 2022 to June 30, 2023** or if the other children would be required to provide parental information if they were completing a FAFSA for the 2022-2023 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, 2023**.

Next, in Step 4, include college information for the household member(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, 2022 and June 30, 2023**.

➤ 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 2022 – June 2023	Enrolled at Least Half-Time?	Year in College
1.		Self	Lake Forest College	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	

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

Notes:

NEW RETG

➤ Instructions for Steps 5 and 6: **2020 Income Information**

There are four ways to document your income. The first three apply to tax filers.

- **Best:** use the IRS Data Retrieval Tool (DRT) to update the FAFSA; go to lakeforest.edu/fafsa and see "Helpful Tools."
- Send a signed copy of the 2020 federal 1040 –including Schedules A & C, and 1-3, if applicable.
- Send a Tax Return Transcript:
 - Go to irs.gov/Individuals/Get-Transcript and choose "Request Online" for immediate access to a .pdf.
 - Do not send a Tax Account Transcript.
- **If you did not file** and are not required to file, check the third or fourth box below and provide any necessary, additional information.

➤ Step 5: **Student's 2020 Income Information**

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

- ☐ I filed a 2020 tax return and have used or will use the IRS DRT to transfer my tax information into the FAFSA.
- ☐ I filed a 2020 tax return and will provide a ☐ 1040 or ☐ Tax Return Transcript ... ☐ now ☐ later ☐ sent previously
- ☐ I **did not** file a 2020 tax return, but **I was employed**, with income from the employers listed below. Include W-2s.
- ☐ I **did not** file a 2020 tax return because **I was not employed** in 2020.

Employer's Name	2020 Amount Earned	Is a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No

➤ Step 6: **Parent(s) 2020 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 2020 tax return and have used or will use the IRS DRT to transfer my tax information into the FAFSA.
- ☐ We/I filed a 2020 tax return and will provide a ☐ 1040 or ☐ Tax Return Transcript ... ☐ now ☐ later ☐ sent previously
- ☐ We/I **did not file** a 2020 tax return, but **at least one of us was employed** with details below. Include W-2s.
- ☐ We/I **did not file** a 2020 tax return because **we were not employed** in 2020.

Employer's Name	2020 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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