



LAKE FOREST
COLLEGE

2022 - 2023 Verification Worksheet V1 - Independent

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, 2022 through June 30, 2023, or if the child would be required to provide your 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 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, 2023**.

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, 2022 and June 30, 2023**.

➤ 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 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	

➤ Instructions for Steps 4 and 5: 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 4: 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	Was a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No

➤ Step 5: Spouse's 2020 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 2020 federal return with the student as "married." S/he used the IRS DRT to transfer our information to the FAFSA.
- I filed a separate 2020 federal return and will provide a 1040 or Tax Return Transcript ... now later sent previously
- I did not file a 2020 federal return, but I was employed in 2020, earning income from the employers listed below. **Include W-2s**.
- I did not file a 2020 federal return because I was not employed in 2020.

Employer's Name	2020 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.

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