



LAKE FOREST
COLLEGE

2022 - 2023 Verification Worksheet V5- Aggregate Verification

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 3) 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, 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 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**.

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 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	

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**

If you filed a 2020 federal tax return (1040) it is best to use the IRS Data Retrieval Tool (DRT) to update the FAFSA; go to lakeforest.edu/fafsa and see "Helpful Tools." You cannot use the DRT if any of the following is true: ① you are married and filed separate tax returns, ② you are married and filed as "head of household", ③ your marital status changed after filing the return, ④ you filed using an ITIN (not SSN), or ⑤ you filed a foreign return.

Alternatives: send a signed copy of the 2020 federal return –including Schedules A & C, and 1-3– **or** a Tax Return Transcript. Go to irs.gov/Individuals/Get-Transcript and choose "Request Online" for immediate access to a .pdf. **Do not choose Tax Account Transcript.** If you filed an amended return, include a signed copy of IRS 1040X along with the original 1040 or tax transcript.

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.

➤ 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 immediately use the IRS DRT to transfer my tax information into the FAFSA.
- I filed a 2020 federal tax return and will provide a 1040 or Tax Return Transcript ... now later sent previously
- I **did not** file a 2020 federal tax return, but I **was employed**, with income from the employers listed below. **Include W-2s.**
- I **did not** file a 2020 federal 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 immediately use the IRS DRT to transfer my tax information into the FAFSA.
- We/I filed a 2020 federal tax return and will provide a 1040 or Tax Return Transcript ... now later sent previously
- We/I **did not file** a 2020 federal tax return, but **one of us was employed**. Income details are provided below. **Include W-2s.**
- We/I **did not file** a 2020 federal 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

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