



LAKE FOREST COLLEGE

# 2023 - 2024 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, 2023 to June 30, 2024** **or** if the other children would be required to provide parental information if they were completing a FAFSA for the 2023-2024 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, 2024**.

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, 2023 and June 30, 2024**.

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 2023 - June 2024	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: **2021 Income Information**

There are two ways to document your income.

- **Best:** use the IRS Data Retrieval Tool (DRT) to update the FAFSA; go to [lakeforest.edu/fafsa](http://lakeforest.edu/fafsa) and see "Helpful Tools."
- Send a Tax Return Transcript (**not Tax Account Transcript**) from [irs.gov/Individuals/Get-Transcript](http://irs.gov/Individuals/Get-Transcript) and choose "Get Transcript Online".
- **If you did not file** and are not required to file, check the third or fourth box below and provide any necessary, additional information.

You cannot use the DRT if: 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.

If you filed an amended return, include a signed copy of IRS 1040X along with the original 1040 or tax transcript.

➤ Step 5: **Student's 2021 Income Information**

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

- I filed a 2021 tax return and have used or will immediately use the IRS DRT to transfer my tax information into the FAFSA.
- I filed a 2021 federal tax return and will provide a  1040 or  Tax Return Transcript ...  now  later  sent previously
- I **did not** file a 2021 federal tax return, but I **was employed**, with income from the employers listed below. Include W-2s, 1099s, etc.
- I **did not** file a 2021 federal tax return because I **was not employed** in 2021.

Employer's Name	2021 Amount Earned	Is a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No

➤ Step 6: **Parent(s) 2021 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 2021 tax return and have used or will immediately use the IRS DRT to transfer my tax information into the FAFSA.
- We/I filed a 2021 federal tax return and will provide a  1040 or  Tax Return Transcript ...  now  later  sent previously
- We/I **did not file** a 2021 federal tax return, but **were employed**. Income details are provided below. Include W-2s, 1099s, etc.
- We/I **did not file** a 2021 federal tax return because **we were not employed** in 2021.

Employer's Name	2021 Amount Earned	Is a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No

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➤ Step 7. Student's Identity/Statement of Educational Purpose ◀

**When you sign this document**, you must present a valid government-issued photo ID (driver's license, state-issued ID, passport, etc.)

There are two options for this to be signed:

- Sign in the Financial Aid Office at Lake Forest College.
- Sign in the presence of a Notary Public.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this Statement, and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Lake Forest during the 2023-2024 academic year.

\_\_\_\_\_  
*Student's Signature* *Date* *ID Number*

**Option #1: Financial Aid Office Use:**

This student appeared before me and presented:  driver's license  state-issued ID  passport  other \_\_\_\_\_ to verify his/her identity.

\_\_\_\_\_  
*Office of Financial Aid Signature* *Date*

**Option #2: Notary Public Use:**

This student appeared before me and presented:  driver's license  state-issued ID  passport  other \_\_\_\_\_ to verify his/her identity.

\_\_\_\_\_  
*Notary's Signature* *Date*

State of \_\_\_\_\_ My commission expires \_\_\_\_/\_\_\_\_/\_\_\_\_ Notary's Seal >>>

➤ Step 8: 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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