



LAKE FOREST
COLLEGE

2025 - 2026 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 your parent is widowed or single, base your answers on that parent alone.
- ✓ If your parents are divorced or separated, answer the questions about the parent **who provides more financial support**, even if you do not live with them. If both parents provided an exactly equal amount of financial support during the past 12 months, or if they don't support you financially, answer the questions about the parent with the greater income and assets. **If this parent is remarried as of today**, answer the questions about that parent and the stepparent.

➤ 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 other children (even if they live apart because of college enrollment), and other people living with the parent now. Include these dependent children and other people only if the parent will provide more than half of their support between July 1, 2025, and June 30, 2026.

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, 2025 and June 30, 2026**.

If more space is needed, attach a separate page with the student's name and Lake Forest ID or last four digits of SSN 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 2025 – June 2026	Enrolled at Least Half-Time?	Year in College
1.		Self	Lake Forest College	<input checked="" type="radio"/> Yes <input type="radio"/> 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: **2023 Income Information**

There are two ways to document your income.

- **Best:** within the FAFSA provide Consent and Approval for the IRS to transfer tax information to your student's FAFSA; go to lakeforest.edu/fafsa and see "Helpful Tools."
- If your current marital status is not the same as what appears on your 2023 tax return, send a signed copy of your 2023 Federal Tax Return to our office, preferably as a .pdf. If you are currently married, include your spouse's return as well.
- **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 2023 Income Information**

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

- ☐ I filed a 2023 tax return and have or will immediately provide Consent & Approval to transfer my tax information to the FAFSA.
- ☐ I filed a 2023 federal tax return and will provide a Tax Return ... ☐ now ☐ later ☐ sent previously
- ☐ I **did not** file a 2023 federal tax return, but I **was employed**, with income from the employers listed below. Include W-2s, 1099s, etc.
- ☐ I **did not** file a 2023 federal tax return because I **was not employed** in 2023.

Employer's Name	2023 Amount Earned	Is a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No

➤ Step 6: **Parent(s) 2023 Income Information**

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

- ☐ I/We filed a 2023 tax return and have or will immediately provide Consent & Approval to transfer my tax information to the FAFSA.
- ☐ I/We filed a 2023 federal tax return and will provide a Tax Return ... ☐ now ☐ later ☐ sent previously
- ☐ I/We **did not** file a 2023 federal tax return, but **at least one of us was employed**, with income from the employers listed below.
- ☐ I/We **did not** file a 2023 federal tax return, **and neither of us were employed** in 2023.

Employer's Name	2023 Amount Earned	Is a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No
	\$	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 2025-2026 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

➤➤ Student must appear in person at the Financial Aid Office to complete this form and present a valid unexpired form of Identification
If unable to attend in person, please sign this form in the presence of a Notary Public. ◀◀
All other applicable supporting documents, such as Tax Return Transcript, W-2s, 1099s, IRS Form 4506, can be sent via email, fax or mail.

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