



LAKE FOREST  
COLLEGE

## 2020 - 2021 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: Student's Family Information

Provide the requested information for **all** people in your household, including:

- ✓ **You** and, if married, your spouse
- ✓ **Your children** (if any) if you will provide more than half of their support from July 1, 2020 through June 30, 2021, or if the child would be required to provide your information if they were completing a FAFSA for the 2020–2021 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, 2021**.

**In addition**, 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, 2020 and June 30, 2021**.

If more space is needed, attach a separate page with your name and Social Security Number (last four digits) or ID at the top.

Your Current Marital Status:     Married     Single     Divorced/Separated     Widowed

Name of Family Member	Age	Relation to the Student	Name of College Attending between July 2020 – June 2021	Enrolled at Least Half-Time?		Year in College
1.		Self	Lake Forest	Yes	No	
2.				Yes	No	
3.				Yes	No	
4.				Yes	No	
5.				Yes	No	
6.				Yes	No	
7.						
8.						

### ➤ Instructions for Steps 2 and 3: 2018 Income Information

**If you filed a 2018 tax return**, use the IRS Data Retrieval Tool (DRT) to update the FAFSA -[lakeforest.edu/fafsa](https://lakeforest.edu/fafsa)- see **Helpful Tools** on right. **Alternatives:** (1) provide a *Tax Return Transcript*, [irs.gov/Individuals/Get-Transcript](https://irs.gov/Individuals/Get-Transcript), 800-908-9946 or (2) a signed copy of your tax return.

**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 even if you did not receive a W-2 form. Attach a separate page if needed.

**You cannot use the DRT if:** you are married and filed separate tax returns, you are married and filed as "head of household", filed an amended return, your marital status is "unmarried and both legal parents living together", your marital status changed in 2019, or you filed a foreign return.

**Note:**

1. You cannot use the DRT if you are married now but filed separate tax returns, filed an amended return, filed a foreign return.
2. If you cannot use the DRT, be sure to provide a Tax Return Transcript (TRT), and not a Tax Account Transcript.

➤ **Step 2: Student's 2018 Income Information**

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

- I filed a 2018 federal tax return and I have used the IRS DRT to transfer my 2018 income information into the FAFSA.
- I filed a 2018 federal tax return and will provide my 2018 IRS Tax Return Transcript     included now     will provide later
- I did not file a 2018 federal tax return, but I was employed in 2018, earning income from the employers listed below. **Include W-2s.**
- I did not file a 2018 federal tax return because I was not employed in 2018.

Employer's Name	2018 Amount Earned	Was a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No

➤ **Step 3: Spouse's 2018 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 2018 federal tax return with the student as "married." S/he used the IRS DRT to transfer our information to the FAFSA.
- I filed a 2018 federal tax return separately from the student. My 2018 Tax Return Transcript     is included now     will be sent later
- I did not file a 2018 federal tax return, but I was employed in 2018, earning income from the employers listed below. **Include W-2s.**
- I did not file a 2018 federal tax return because I was not employed in 2018.

Employer's Name	2018 Amount Earned	Was a W-2 Provided?	
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No
	\$	Yes	No

➤ **Step 4: 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

➤➤ 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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