

**2024-2025 Independent Student
Verification of Family Size & Income (U.S. Tax Filer)**

Student Legal Name (First & Last)

Lewis & Clark ID

Student Email Address

Family Size

The following people should be included in the grid below as part of your family size:

- **Yourself** (the student)
- **Your spouse** (if applicable),
- **Your dependent children (biological, adoptive, and/or step children) if you could claim them as a dependent on a U.S. Tax Return at the time you file your FAFSA, and ALL of the following is true:**
 - They live with you (or live apart because of college enrollment),
 - They receive more than half of their support from you, and
 - They will continue to receive more than half their support from you July 1, 2024 - June 30, 2025
- **Other people if you could claim them as a dependent on a U.S. Tax Return at the time you file your FAFSA, and ALL of the following is true:**
 - They live with you,
 - They receive more than half of their support from you, and
 - They will continue to receive more than half their support from you between July 1, 2024 - June 30, 2025

List name, age, and relationship to the student for all household members. Attach a separate sheet if needed.

Full Name	Age	Relationship to Student
		Self

STUDENT Income Information

2022 Student U.S. Tax Return Filed with the IRS

Students who filed 2022 federal tax return(s) with the IRS must check ONE box and provide corresponding documentation.

- I/We successfully utilized the Direct Data Exchange (DDX) to import Federal Tax Information into the FAFSA.
- Attached is a **SIGNED** copy of the student's (and spouse, if applicable) 2022 federal tax return(s) and Schedule(s) 1, 2, and/or 3 (as applicable).
- Attached is a copy of the student's (and spouse, if applicable) 2022 **Tax Return Transcript**(s) obtained at no cost from the IRS. Visit [IRS - Get Your Records](#) to review the options to obtain an **IRS Tax Return Transcript**. Once received, add the student's L&C ID number to each page, prior to submitting it to our office.

Important Note: If you filed a joint tax return, and at the time of filing the FAFSA were separated, divorced, widowed, or married to someone not on the joint return, you must submit 2022 W-2 Forms or equivalent documents for all sources of employment income included on the tax return.

OR

2022 Student IRS Tax Filing Extension Approved

Students who are required to file a 2022 U.S. federal tax return with the IRS, but have not yet filed due to an approved filing extension must check the box below and provide all documents listed.

- I certify the student (and spouse, if applicable) is required to file a 2022 U.S. federal income tax return, but the IRS approved a filing extension beyond the automatic six-month extension. All of the following items are attached:
 - A signed/dated statement from the student listing the sources of any 2022 income and the amount of income from each source. (*Note: If self-employed, the signed statement must also indicate the amount of estimated Adjusted Gross Income (AGI) and U.S. income tax paid for tax year 2022.*)
 - A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022, and
 - Copies of the student's (and spouse, if applicable) 2022 W-2 Form(s) or equivalent document(s) for each source of employment income.

OR

2022 Student Non-Tax Filers – Not Required to File

Students (and spouse, if applicable) who are NOT required to file a 2022 U.S. federal tax return with the IRS must check the box below and provide all documents listed.

- I certify the student (and spouse, if applicable) did not, and is not required to, file a 2022 U.S. federal income tax return with the IRS. The student must submit ALL of the following:
 - Copies of the student's (and spouse, if applicable) 2022 W-2 Form(s) or equivalent document(s),
 - A signed and dated statement certifying all of the following:
 - The student's name (and spouse, if married)
 - An affirmative statement to certify you (and spouse, if married) are not required to file a 2022 U.S. federal income tax return with the IRS, and
 - The source(s) and amounts of earnings, other income, and resources that supported the individual(s) for the 2022 tax year.

NEXT STEP: PRINT, SIGN, and SUBMIT this form!

TYPED/DIGITAL SIGNATURES ARE NOT ACCEPTABLE

By signing this form, I certify that all the information reported is complete and correct. I understand that if I purposely give false or misleading information, I may be fined, sent to prison, or both.

Student Signature

Date

Upload this complete, signed form and any required tax-related documents to one of the following secured portals:

- [INCOMING Undergraduate Students – LC Portal](#)
- [CONTINUING Undergraduate Students – Financial Aid Document Upload Portal](#)
- [All GRADUATE and LAW Students – Financial Aid Document Upload Portal](#)