

**2025-2026 Dependent 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 parent(s) family size:

- **Yourself** (the student).
- **Your parent(s), read below for clarification:**
  - Even if you (the student) do not live with them.
  - Exclude a parent who has died or is not living in the household because of separation or divorce.
  - Include a parent who is on active duty in the U.S. Armed Forces apart from the family.
- **Your parent(s)' other children if your parent(s) 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 your parent(s) or live apart because of college enrollment,
  - They receive more than half of their support from your parent(s), and
  - They will continue to receive more than half their support from your parent(s) between July 1, 2025 and June 30, 2026
- **Other people if your parent(s) 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 your parent(s),
  - They receive more than half of their support from your parent(s), and
  - They will continue to receive more than half their support from your parent(s) between July 1, 2025 and June 30, 2026

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

## PARENT Income Information

### 2023 Parent U.S. Tax Return Filed with the IRS

Parent(s) who filed 2023 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 2023 federal tax return(s) and Schedule(s) 1, 2, and 3 (as applicable) for all parent contributors on the FAFSA. **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 other than the individual on the joint return, you must submit 2023 W-2 Form(s) or equivalent documents for **all** employment income reported on the tax return.
- Attached is a copy of a 2023 **Tax Return Transcript**(s), obtained at no cost from the IRS, for all parent contributors to the FAFSA. You may visit [IRS - Get Your Records](#) to review your options to obtain an **IRS Tax Return Transcript**. Once you receive the transcript - 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 other than the individual on the joint tax return, you must submit 2023 W-2 Form(s) or equivalent documents for **all** employment income reported on the Tax Return Transcript.

OR

### 2023 Parent IRS Tax Filing Extension Approved

Parent(s) who are required to file a 2023 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/We the parent(s) certify that I/we are required to file a 2023 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 parent(s) listing the sources of any 2023 income and the amount of income from each named 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 2023.*)
  - A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023, and
  - Copies of all parent(s) 2023 W-2 Form(s) or equivalent document(s) for each source of employment income.

OR

### 2023 Parent Non-Tax Filers – Not Required to File

Parent(s) who are NOT required to file a 2023 U.S. federal tax return with the IRS must check the box below and provide all documents listed.

- I/We did not, and are not required to, file a 2023 U.S. federal income tax return with the IRS. All of the following items are attached:
- Copies of all parent(s) 2023 W-2 Form(s) or equivalent document(s) for each source of income received,
  - A signed and dated statement that includes all of the following:
    - The name(s) of the parent(s) reported on the FAFSA,
    - An affirmative statement to certify the individual(s) is/are not required to file a 2023 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 2023 tax year.
  - For individual(s) who do NOT have a Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), or Employer Identification Number (EIN) – make an affirmative statement to certify they do not have an SSN, ITIN, or EIN.

## STUDENT Income Information

### 2023 Student U.S. Tax Return Filed with the IRS

Students who filed 2023 federal tax return(s) with the IRS must check ONE box and provide corresponding documentation.

- I successfully utilized the Direct Data Exchange (DDX) to import Federal Tax Information into the FAFSA.
- Attached is a **SIGNED** copy of the student's 2023 federal tax return(s) and Schedule(s) 1, 2, and 3 (as applicable).
- Attached is a copy of the student's 2023 **Tax Return Transcript**(s) obtained at no cost from the IRS. You may visit [IRS - Get Your Records](#) to review your options to obtain an **IRS Tax Return Transcript**.

OR

### 2023 Student IRS Tax Filing Extension Approved

Students who are required to file a 2023 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 that I'm required to file a 2023 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 2023 income and the amount of income from each named 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 2023*).
  - A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023, and
  - Copies of all of the student's 2023 W-2 Form(s) or equivalent document(s) for each source of employment income.

OR

### 2023 Student Non-Tax Filers – Not Required to File

Students who are NOT required to file a 2023 U.S. federal tax return with the IRS must check the box and provide all documents.

- I did not, and am not required to, file a 2023 U.S. federal income tax return with the IRS. All of the following items are attached:
  - Copies of all of the student's 2023 W-2 Form(s) or equivalent document(s) for each source of income received,
  - A signed and dated statement that includes all of the following:
    - The name of the student reported on the FAFSA,
    - An affirmative statement to certify the individual is not required to file a 2023 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 for the 2023 tax year.
    - For individual(s) who do NOT have a Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), or Employer Identification Number (EIN) – make an affirmative statement to certify they do not have an SSN, ITIN, or EIN.

**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.

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**Student Signature**

**Date**

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**Parent Signature**

**Date**

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

- [INCOMING Students – LC Portal](#)
- [CONTINUING Students – Financial Aid Document Upload Portal](#)