

**2025-2026 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 between July 1, 2025 - June 30, 2026
- **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, 2025 - 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

STUDENT Income Information

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

Students (and spouse, if applicable) 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 my/our 2023 federal tax return(s) and Schedule(s) 1, 2, and 3 (if applicable).
- Attached is a copy of my/our 2023 **Tax Return Transcript**(s) obtained at no cost from the IRS. Visit [IRS - Get Your Records](#) to obtain an **IRS Tax Return Transcript**. Once received, add your L&C ID to each page before submitting it to Financial Aid.

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 joint tax return.

OR

2023 Student IRS Tax Filing Extension Approved

Students (and spouse, if applicable) 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/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 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 your (and spouse, if applicable) 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 (and spouse, if applicable) who are NOT required to file a 2023 U.S. federal tax return with the IRS must check the box and provide all documents listed.

- I/We did not, and am/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 of your (and spouse, if applicable) 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 (and spouse, if applicable) 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 you 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 a statement to certify you 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.

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](#)