



APPLYING FOR FINANCIAL AID FOR THE 2022-23 SCHOOL YEAR

We partner with School and Student Services (SSS) in our financial aid process. The SSS application for financial aid consists of three parts, the Parents' Financial Statement (PFS), a \$55 application fee, and submission of all required documents. This year's deadline is **February 15, 2022**. To make our decision, we use the information from the PFS as a starting point but also consider our school policies, practices, and available budget. 'Iolani School's Financial Aid Office will communicate the financial aid decision to you.

Give yourself the time you need by not waiting until the deadline to begin. SSS has a wide range of helpful materials aimed at helping you complete your Parent Financial Statement (PFS). They can be found on the [SSS Resource Center](#).



HOW TO COMPLETE THE PARENTS' FINANCIAL STATEMENT (PFS) ONLINE

- Read through the list of required documents. You may need to reference them throughout the PFS.
- If you applied for financial aid last year, simply [login to the PFS Online](#) as a Returning Family, *using the email address and password you set up last year*. Otherwise, create your new PFS Online account.
- Begin a PFS for Academic Year 2022-23. You can log out of the PFS Online at any time, then return later to complete it. Having your completed 2021 taxes in-hand can speed up submission, otherwise estimate.
- Many Hawai'i schools use SSS. 'Iolani School's SSS code is 4144.
- After you have pressed "submit", you'll be prompted for a \$55 nonrefundable fee. If your family is eligible for a fee waiver, SSS will automatically apply it at the time of submission.
- *After you pay for and submit your PFS, you'll have access in the PFS Online to a section called "My Documents."*



HOW TO UPLOAD REQUIRED/ADDITIONAL DOCUMENTS ONLINE

- Prepare your documents to be uploaded. Double-check the document checklist. Remove security, SS#, or password protections.
- **TIPS:** Be careful not to upload your documents more than once. Each document should be saved as a separate file (Mom's W2 separate from Dad's W2), unless you are submitting a 1040 "bundle" (like Turbo Tax). If your taxes include your W-2(s), you do not have to upload them separately. The system will find them within your other tax documents and process them accordingly.
- Click "**n/a**" if a document is listed, but doesn't apply (ie mortgage statement).
- Login to SSS. Select the 2022-23 academic year. Choose the "My Documents" tab from your dashboard view.
- Click either the upload button or the document hyperlink, allowing you to name, locate and save the file to SSS. Do not exceed 10 MB size.
- The date will appear in the "Date Uploaded" column, confirming submission.



MAILING DOCUMENTS TO SSS

We do not collect hard copies of documents. If you are uncomfortable uploading documents, mail them to SSS. All mailed documents must be accompanied by a pre-populated SSS cover sheet found in the "My Documents" tab (above the Required Documents list). Download, print, and postmark by the February 15, 2022 deadline.

- To submit required documents by mail, send to:
Community Brands
110 North 5th Street, Second Floor
Minneapolis, MN 55403



FINANCIAL AID CHECKLIST



DOCUMENTS CHECKLIST

REQUIRED:

If a document is requested in SSS, but not applicable to your family, please click the "N/A" option so we understand your application is complete.

- Signed copy of filed 2021 IRS 1040 Form including *all* schedules and attachments
- Signed copy of filed 2021 State Taxes including *all* schedules and attachments
- Copies of 2021 W-2's and 1099s, *in their entirety**
- End of year (2021) paycheck stub(s)

*Late 1099s will be accepted. Please upload when available.

REQUIRED, IF APPLICABLE (Upload to SSS's "Other Required Documents"):

- Mortgage(s)/ HELOC statement(s) for *all* residential/ investment properties (to include first and second mortgages)
- Copy of filed 2021 Business Tax Returns and/or K1s
- Financial aid award letters for all siblings attending a tuition charging school (PreSchool-12) or 1098T for college students (available in college portal).
- FBAR/International Assets Form/ IRS Form 3520
- SNAP/Housing Benefit Statement(s)
- Non-custodial parent's PFS and corresponding documents (all biological parents and step-parents are required to submit PFS and documentation.)

Other supporting documents (e.g. student's tax return, court documents, social security, veteran or retirement benefits, workers compensation, unemployment compensation, COLA, disability insurance, or any additional income or benefit statements) are welcome or may be requested at a later date by the financial aid staff.



APPLICATION TIMETABLE

December 7	Financial Aid webinar
February 15	Deadline for receipt of PFS, application fee and all required documents
Early April	Award notification for newly admitted 6-12 students
End of April	Award notification for newly admitted K students
End of May	Award notification for returning students



RESOURCES

[Iolani Financial Aid Website](#) [SSS Application for Aid](#) [SSS Resource Center](#)

Iolani Financial Aid Office - 563 Kamoku Street - Honolulu, HI 96826 - (808) 943-2397 - financialaid@iolani.org