



Financial Aid Documentation Checklist

RETURNING FAMILIES APPLYING **LATE**

Those families applying late have until **April 15, 2023** to upload all documents. You are *highly encouraged* to submit all documents ASAP as we will be trying to provide decisions on a rolling basis, but no later than late May 2023 (when we close the awarding season).

Applications are not complete until the following documents are uploaded to SSS. Click “N/A” if something doesn’t pertain to you.

Required:

- Filed 2022 IRS 1040 Form including all schedules and attachments
- Filed 2022 State Taxes including all schedules and attachments
- All 2022 W2’s, in their entirety, no cutouts
- Current mortgage/ HELOC balance statement(s) for all residential and investment properties (if applicable)
- End of Year 2022 paycheck stub(s) for all 2022 employment
- 'Iolani School Supplemental Questionnaire (available in SSS/one per household)

Required, if applicable:

- Business Owners: Filed 2022 Business Tax Returns (IRS Form 1120S, 1065 or 1120)
- All 2022 K1s (business, trusts, partnerships, investments, etc.)
- Financial Aid award letters for all non-'Iolani siblings attending a tuition charging school (PS-12), 1098T for college students (if applicable)
- FBAR/International Assets Form/ IRS Form 3520
- SNAP/Housing Benefit Statement(s)
- Unemployment Benefit/ Worker's compensation/ TDI statement(s)
- Non-custodial parent's PFS and corresponding documents