



Financial Aid Documentation Checklist FAMILIES IN THE ADMISSION PROCESS

Families should upload documents to SSS - OR - mail all documents directly to SSS by **February 15, 2023**. Applications are not complete until we receive the following documents.

Required:

- Filed 2021 IRS 1040 Form including all schedules and attachments (no drafts)
- Filed 2021 State Taxes including all schedules and attachments (no drafts)
- All 2021 W2's (all pages), in their entirety, no cut outs
- All 2022 W2's (all pages), in their entirety, no cut outs
- December 2022 paycheck stub
- 'Iolani School Supplemental Questionnaire (available in SSS)
- Recent monthly mortgage/ HELOC balance statement(s) for all residential and investment properties

Required, if Applicable:

- Business Owners: Filed 2021 Business Tax Returns (IRS Form 1120S, 1065 or 1120)
- All 2021 K1s (business, trusts, partnerships, investments, etc.)
- Financial Aid award letters for all siblings attending a tuition charging school (PS-12), 1098T for college students
- 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

Notifications

Families who meet the February 15 deadline will be notified in early April (Gr. 6-12) or early May (Kindergarten) of their financial aid decision.

Please keep in mind late submissions or complex situations may require families to submit additional, or more current information, which could delay aid notifications.