



Financial Aid Documentation Checklist

RETURNING FAMILIES

Returning families should upload documents to SSS by **October 15, 2022**. Applications are not complete until we receive the following documents. Click “N/A” if something doesn’t pertain to you.

Required:

- September 2022 paycheck stub(s) for all 2022 employment
- Year-To-Date Profit & Loss Statement through September 2022 (business owners)
- 'Iolani School Supplemental Questionnaire (available in SSS/one per family)
- Filed 2021 IRS 1040 Form including all schedules and attachments
- Filed 2021 State Taxes including all schedules and attachments
- All 2021 W2's (all pages), in their entirety, no cutouts
- Current mortgage/ HELOC balance statement(s) for all residential and investment properties (if applicable)

IF YOU ARE A RETURNING FAMILY WHO IS ALSO APPLYING A CHILD FOR 2023-24 ADMISSION, YOUR DEADLINE IS OCTOBER 15, 2022. YOU WILL BE ASKED (IN JANUARY OF 2023) TO UPLOAD ALL 2022 W2'S AND DECEMBER 2022 PAYCHECK STUBS.

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 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

Notifications

Most returning families will be notified of their financial aid decision in early February 2023 (alongside the re-enrollment period). Some families may be asked to submit additional, or more current information, which would delay notification.