

# PAYCHECK PROTECTION PROGRAM CHECKLIST

## A Complete File Gets Processed The Fastest.

- SBA application (most recent version). SBA Form 2483 (4.20 - bottom-left corner of the app).
- Page 1 of 2018 or 2019 tax return of the applicant.
- Individuals with Self-Employment Income of file a Form 1040, Schedule C
  - If no employees provide: 2019 Schedule C (even if not filed), 1099-MISC detailing non-employee compensation, and an invoice or bank statement demonstrating you were in business after 2.15.2020.
  - If you have employees provide: 2019 Schedule C (even if not filed), 2019 IRS Form 941 or 940, 2019 employer paid health insurance contributions, and a payroll statement demonstrating you were in business after 2.15.12020.
- Loan amount calculation methodology (share math and provide supporting info).
- 2019 940 Report or 941s for the last 4 quarters.
- Detailed list of employees paid > than \$100,000 in Gross Wages in 2019 and compensation totals for each. Include a detailed year-end Payroll Register.
- Articles of organization and operating agreement for LLCs.
- Articles of Incorporation and Bylaws for Sub S and C Corporations.

Personal Information	Ownership %	SSN	Copy of Driver's License	Home Address
• Anyone owning 25% or more.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
• Authorized signers.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• For Non-Profits—authorized signers.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Common Mistakes

- If you want to include the employer portion of the medical or retirement benefits in the loan amount calculations, please include clear evidence: 1. that these amounts are not already included in Line 3 of your 2019 940 and 2. that it only includes the employer's contribution and not any employee withholdings.
- Ownership section of application is intended for personal information on owners of for-profit entities and officers or board members of non-profit entities.
- Initial on the lines provided next to questions 5 & 6.
- Read Question 7 closely.
- Included Addendum A if you answer YES to Question 3.



You're a neighbor, not a number.