



SBA Paycheck Protection Program Application Checklist

- SBA Form 2483 (Paycheck Protection Program Application Form) - Required

Supporting Documentation consisting of the following, as applicable:

Self-Employed Individuals with no employees:

- 2019 IRS Form 1040 Sch. C
- 2019 IRS Form 1099-MISCH
- Invoice, bank statements or book of record establishing self-employment in 2019
- Invoice, bank statements or book of record establishing self-employment in 2020

Self-Employed Individuals with employees:

- 2019 IRS Form 1040 Sch. C
- 2019 IRS Form 941 for each quarter
- 2019 State quarterly wage unemployment insurance tax reporting (or equivalent payroll processor records or IRS Wage and Tax Statements)
- Documentation of any retirement or health insurance contributions
- Payroll statement or similar documentation from the pay period that covered February 15, 2020 to establish business operation and employees as of that date

Self-Employed Individuals who report income on IRS Form 1040 Sch. F:

- 2019 IRS Form 1040 Sch. F
- 2019 IRS Form 1040 Sch. 1
- 2019 State quarterly wage unemployment insurance tax reporting (or equivalent payroll processor records or IRS Wage and Tax Statements)
- Documentation of any retirement or health insurance contributions
- Payroll statement or similar documentation from the pay period that covered February 15, 2020 to establish business operation and employees as of that date

Partnerships:

- 2019 IRS 1065 (including Sch. K-1s)
- 2019 IRS Form 941 for each quarter
- 2019 State quarterly wage unemployment insurance tax reporting (or equivalent payroll processor records or IRS Wage and Tax Statements)
- Documentation of any retirement or health insurance contributions
- Payroll statement or similar documentation from the pay period that covered February 15, 2020 to establish business operation and employees as of that date; or if the partnership has no employees, an invoice, bank statement, or book of record establishing the partnership was in operation on February 15, 2020

S-Corporations:

- 2019 IRS Form 1120-S, including all Schedules and Attachments
- 2019 IRS Form 941 for each quarter
- 2019 State quarterly wage unemployment insurance tax reporting (or equivalent payroll processor records or IRS Wage and Tax Statements)
- Documentation of any retirement or health insurance contributions
- Payroll statement or similar documentation from the pay period that covered February 15, 2020 to establish business operation and employees as of that date

Corporations:

- 2019 IRS Form 1120, including all Schedules and Attachments
- 2019 IRS Form 941 for each quarter
- 2019 State quarterly wage unemployment insurance tax reporting (or equivalent payroll processor records or IRS Wage and Tax Statements)
- Documentation of any retirement or health insurance contributions
- Payroll statement or similar documentation from the pay period that covered February 15, 2020 to establish business operation and employees as of that date

Non-Profit Organization (up to \$10 million):

- 2019 IRS Form 990 Part IV or other documentation of any retirement and health insurance contributions
- 2019 IRS Form 941 for each quarter
- 2019 State quarterly wage unemployment insurance tax reporting (or equivalent payroll processor records or IRS Wage and Tax Statements)
- Documentation of any retirement or health insurance contributions
- Payroll statement or similar documentation from the pay period that covered February 15, 2020 to establish business operation and employees as of that date

Non-Profit Religious Institutions, Veterans Organizations and tribal businesses (up to \$10 million):

- 2019 IRS Form 941 for each quarter
- 2019 State quarterly wage unemployment insurance tax reporting (or equivalent payroll processor records or IRS Wage and Tax Statements)
- Documentation of any retirement or health insurance contributions
- Payroll statement or similar documentation from the pay period that covered February 15, 2020 to establish business operation and employees as of that date

Limited Liability Company (“LLC”):

- LLCs should follow the instructions that apply to their tax filing situation (i.e. sole proprietorship, partnership or corporation)