

# BEFORE YOU BEGIN

Prep **ALL** your documents **before** starting your SBA PPP Loan Application for Sole Proprietors.

You will not be able to complete your application unless ALL required documents have been uploaded. To help you stay organized, use the following checklist to make sure you have everything you need.

## REQUIRED DOCUMENTS CHECKLIST

FINANCIALS NEEDED	
<b>NO EMPLOYEES</b>	
2019 1040 with Schedule C (If 2019 not filed must complete Schedule C and submit to Lender)	
1099-MISC detailing non-employee compensation received (box7) OR invoices, OR bank statements, OR book of record that establishes you are self-employed.	
2020 invoice, bank statement or book of record to establish you were in operation on or around 2-15-20	
<b>WITH EMPLOYEES</b>	
2019 1040 with Schedule C (If 2019 not filed must complete Schedule C and submit to Lender)	
Form 941 (or other tax form or equivalent payroll processor records containing similar information as Form 941)	
State Quarterly wage unemployment insurance tax reporting forms from Each quarter in 2019 (or Equivalent payroll processor records)	
Documentation supporting retirement	
Payroll statement or similar documentation from the pay period that covered 2-15-20	
<b>CORPORATE DOCUMENTS (BASED ON CORPORATION TYPE)</b>	
Fictitious Business Name (if applicable)	
<b>SBA PPP APPLICATION</b>	
SBA Loan Application	
<b>PHOTO ID</b>	
Photo ID of Authorized Representative on PPP Application	