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| **CLIENT:** | General Use |  |
| **RE:** | SBA Emergency Loan Applications |  |
| **DATE:** | 6 April 2020 |  |

USE THIS CHECKLIST AS A RESOURCE WHEN COMPLETING BUSINESS LOAN APPLICATIONS.

**PLEASE NOTE:** ADDITIONAL TASKS MAY BE NECESSARY (*CONSULT WITH YOUR LENDER FOR MORE INFORMATION*).

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| APPLICATION CHECKLIST: *Paycheck Protection Program (PPP)* | | |
|  | 1. | Paycheck Protection Program Application 🡪 [SBA Form 2483](https://www.sba.gov/sites/default/files/2020-04/PPP%20Borrower%20Application%20Form.pdf) |
|  | 2. | Request for Transcript of Tax Return 🡪 [IRS Form 4506-T](https://www.irs.gov/pub/irs-pdf/f4506t.pdf) |
|  | 3. | Quarterly Federal Tax Returns (for all four quarters in 2019) 🡪 [IRS Form 941](https://www.irs.gov/pub/irs-pdf/f941.pdf) |
|  | 4. | Transmittal of Wage & Tax Statements—*Employer’s Summary of W-2’s Transmitted*  (2019) 🡪 [W-3 Form](https://www.irs.gov/pub/irs-pdf/fw3.pdf) |
|  | 5. | Payroll Summary Report (for Jan-Feb 2020)  [***OR*** *Quarterly Federal Tax Return (for Q1 2020), if available]* |
| NEXT STEPS?  Once you have completed all required paperwork, you will need to submit the documents to your PPP-participating lender.  I have submitted the required PPP paperwork to my lender. | | |

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| APPLICATION CHECKLIST: *Economic Injury Disaster Loan (EIDL)* | | |
|  | 1. | Disaster Business Loan Application—*COVID-19 Economic Injury* 🡪 Online [here](https://covid19relief.sba.gov/#/) OR [SBA Form 5](https://disasterloan.sba.gov/ela/Documents/Disaster%20Business%20Loan%20Application%20(SBA%20Form%205).aspx) |
|  | 2. | Request for Transcript of Tax Return 🡪 [IRS Form 4506-T](https://www.irs.gov/pub/irs-pdf/f4506t.pdf) |
|  | 3. | Personal Financial Statement 🡪 [SBA Form 413D](https://disasterloan.sba.gov/ela/Documents/Personal_Financial_Statement.aspx) |
|  | 4. | Schedule of Liabilities 🡪 [SBA Form 2202](https://disasterloan.sba.gov/ela/Documents/Schedule_of_Liabilities.aspx) |
|  | 5. | EIDL Additional Filing Requirements 🡪 [SBA Form 1368](https://disasterloan.sba.gov/ela/Documents/Monthly_Sales_Figures_(1368).aspx) |
|  | 6. | EIDL Supporting Information 🡪 [ODA Form P-019](https://drive.google.com/open?id=1WmdbCLJenacR4miXzBBSct0OVZ75rOH_) |
| NEXT STEPS?  Once you have submitted the online application & completed all required paperwork, you will need to retain the application number (issued by the SBA after submitting the application) & additional documents. After the SBA processes the initial online application, you should receive a confirmation email\* from the SBA. It is expected that the additional supporting documents will be requested at this point, however, this is not verified.  I have completed the online EIDL application & required paperwork.  \* *SBA.gov states that the Initial turnaround time for the SBA confirmation email is 3 business days, but the current wait time is proving longer (5+ business days)*  *Publication date: 4.5.20* | | |