

SBA Second DRAW - Existing Customer Checklist to check off and Submit with Application

1)	Filled out and hand signed and initialed Application (FORM 2483 -SD) and if your answer is yes on number 3 of the application must send in an Addendum A	
2)	Sole Proprietors and Independent Contractors will need to supply a copy of your FILED 2019 Schedule C	
3)	If you are electing to switch to the 2020 payroll period to calculate your loan , Copies of all 2020 payroll reports and 941's (4th Quarter if available). Such reports should include gross wages including PTO (which might include vacation, sick, and other PTO). This includes payroll gross wages including PTO (which might include vacation, sick, and other PTO).	
4)	Documentation reflecting the health insurance premiums paid by the company under a group health plan, including owners of the company, for all of 2020. Copies of the monthly invoices should suffice. <i>***if you are electing the 2020 payroll period to calculate your loan amount</i>	
5)	Documentation of all retirement plan funding by the employer for all of 2020. Copies of workpapers, schedules and remittances to the retirement plan administrator should be sufficient. <i>***if you are electing the 2020 payroll period to calculate your loan amount</i>	
6)	Proof of 25% reduction in Revenue - relevant tax forms, including annual tax forms, or if relevant tax forms are not available, quarterly financial statements or bank statements, if the financials are not audited you must sign and date the first page of the financial statement (Profit and Loss Statement) and initial all other pages - If a Sch. C must send in their filed 2019 form again	If your loan amount is under \$150,000, you do not need to submit this documentation until you apply for forgiveness
7)	2019 Tax Return with NAICS CODE showing and matching what is listed on application	
8)	Copy of Voided Check and Wire Instructions from bank the funds will be going to. Cannot just be an email	

Below must be filled out and sent in with application. Put a VALID email and best phone number to reach you so our processors can reach out for signing of loan documents

SIGNERS ON COMPNAY	Email	Contact phone number
1		
2		
3		
4		
5		
6		
7		