

Paycheck Protection Program Documentation Prep List

Get prepared for your next Paycheck Protection Program (PPP) Loan application!

Use the following checklist to gather the documentation that you need to complete your application. When the

SBA releases guidelines for PPP funding, and, if you completed our contact form, we will notify you immediately so you can begin your loan application.

How do I know if my business is eligible? Previous PPP loan recipients with fewer than 300 employees may qualify if they have more than a 25% drop in revenue quarter over quarter from the previous year. If you are applying for your second PPP loan, you will need to have used the full amount of funds from your first PPP loan before your second is disbursed.

CARES Act Report

A CARES Act Report is generated straight from your payroll provider, such as ADP or Gusto. This method allows your loan processing team to review your loan quicker.

Tax Documents for 2019

Choose a tax document that's easiest for you to provide.
Your selected tax document will depend on your business's entity type.

Business Type	Tax Documents Required	
S Corporations	Form 1120-S	Form 941
Partnerships and/or LLCs	Form 1065	Form 941
C Corporations	Form 1120	Form 941
Sole Proprietors or Independent Contractors	Form 1040	N/A
Non-profits	Form 990	Form 941 or 944

Voided Check

You will need to submit a photo or copy of a voided check, front and back, from your business bank checking account.

Driver's License or Passport

You will need a photo or color copy of the front and back of your identification. Taking a photo with your smartphone works well.