

Document Request List



Draft as of 1/19/21
List based on required information from Biz2Credit. If using a different lender; requirements will vary

Sole Props (With Employees)	Sole Prop or LLC (No Employees)	Entities (With Employees)
Copy of calculation of payroll utilized in round 1 (i.e. excel schedule). A new PP2 excel template has been provided to update as necessary	Copy of calculation of payroll utilized in round 1 (i.e. excel schedule). A new PP2 excel template has been provided to update as necessary	Copy of calculation of payroll utilized in round 1 (i.e. excel schedule). A new PP2 excel template has been provided to update as necessary
2019 IRS From 1040 Schedule C	2019 IRS From 1040 Schedule C	2019 or 2020 Payroll summary report or IRS Form 940 (depending on year utilizing for PPP loan)
2019 or 2020 Payroll summary report or IRS Form 940 (depending on year utilizing for PPP loan)	Driver's License(s) or other Real ID document (front and back)	IRS Form 941 (quarterly payroll tax form) - Q1 2020 (utilized to verify company active as of 2/15/20)
IRS Form 941 (quarterly payroll tax form) - Q1 2020 (utilized to verify company active as of 2/15/20)	PPP-Addendum A (listing of affiliated entities). Example is provided, but can be any format.	2019 business tax returns (include K-1s when applicable)
Driver's License(s) or other Real ID document (front and back)	PPP-Addendum B (EIDL support, if applicable)	Driver's License(s) or other Real ID document (front and back)
PPP-Addendum A (listing of affiliated entities). Example is provided, but can be any format.	Additional documents if needed	PPP-Addendum A (listing of affiliated entities). Example is provided, but can be any format.
PPP-Addendum B (EIDL support, if applicable)		PPP-Addendum B (EIDL support, if applicable)
Additional documents if needed		Additional documents if needed
Statements to prove revenue reduction of 25% (Likely quarterly financials or bank statements. Quarterly financial statements for the entity. If the financial statements are not audited, the Applicant must sign and date the first page of the financial statement and initial all other pages, attesting to their accuracy. If the financial statements do not specifically identify the line item(s) that constitute gross receipts, the Applicant must annotate which line item(s) constitute gross receipts.)	Statements to prove revenue reduction of 25% (Likely quarterly financials or bank statements. Quarterly financial statements for the entity. If the financial statements are not audited, the Applicant must sign and date the first page of the financial statement and initial all other pages, attesting to their accuracy. If the financial statements do not specifically identify the line item(s) that constitute gross receipts, the Applicant must annotate which line item(s) constitute gross receipts.)	Statements to prove revenue reduction of 25% (Likely quarterly financials or bank statements. Quarterly financial statements for the entity. If the financial statements are not audited, the Applicant must sign and date the first page of the financial statement and initial all other pages, attesting to their accuracy. If the financial statements do not specifically identify the line item(s) that constitute gross receipts, the Applicant must annotate which line item(s) constitute gross receipts.)
Evidence of any retirement and employee group health, life, disability, vision and dental insurance contributions, must be provided.		Evidence of any retirement and employee group health, life, disability, vision and dental insurance contributions, must be provided.