SBA Documentation Needed:

-- NEXT STEPS --

1. *Corporate Information*
   * State-approved Articles of Incorporation.
   * 501(c)(3) determination letter from the IRS.
   * Name and Address of potential Signers for the Good Faith Certificate (Loan).
2. *Financial Information*
   * Internal Financial Statements (whatever you have)
     + Balance Sheet - December 31, 2019
     + Income Statement - Jan 1, 2019 - Dec 31, 2019
3. *Bank Information*
   * Where do you have your banking relationship?
   * Is your bank an approved SBA Lender?
   * Do you want to use your current operating bank or another suggested bank?
   * Provide a voided check where the funds should be deposited.
4. *Payroll information*:
   * 2019 Quarterly Federal Tax Filings (941’s)
   * All W2s issued in 2019
   * All 1099s issued in 2019
   * For the period of 3/1/2019 - 2/29/2020, summarized by employee (csv or .xlsx format):
     + Payroll Register
     + Employer portion of Healthcare Insurance
     + Employer portion of retirement benefit
     + State or local taxes assessed and paid