

All PPP loan applicants will need to provide:

- Drivers license for all business owners

- Tax returns (2019 or 2020, whichever filed last)
 - Form 941
 - Form and instructions [HERE](#)
 - Ideally, please have Form 941 for the four quarters of 2019 and, if available, the first quarter of 2020.
 - If you work with a Professional Employer Organization (PEO) and do not have IRS Form 941, please have your latest payroll report from the PEO that covers 12 months of payroll.
 - If you do not file an IRS form 941 please upload the annual IRS 944 filing from 2019

 - 1099 Misc
 - Form and instructions [HERE](#)

 - Form 4506
 - [What is Form 4506?](#)
 - Form [HERE](#)

- Schedule of Liabilities
 - SBA Form 2202 is for all liabilities that your company owes.
 - Form [HERE](#)

- The start date for your business

- NAICS code for the business applicant
 - Look up your NAICS code [HERE](#)

- Your bank account info, routing number, statements, and void check

- Payroll records for Jan 1, 2019 to present (**NOT needed for Sole Proprietor**)
 - Records should include individual employee headcount and any other eligible expenses deemed as payroll costs (as defined by the SBA Final Rule)

- Proof of business activity in 2020

- Legal documents for your business (incorporating documents, state licenses, dba proof)

If you are a sole proprietor or self-employed, you will likely need to provide:

- 2019 IRS Form 1099-MISC for any independent contractors paid, not to exceed \$100,000 for the year ([HERE](#))

- 2019 IRS Form 1040-C if your business is a sole proprietorship ([HERE](#))

If your business has employees, you will likely need to provide:

- 2019 IRS Form 940 for unemployment costs ([HERE](#))

- 2019 IRS Form 941 for quarterly salary, wages, commissions, and tips ([HERE](#))

- 2019 IRS Form 944 ([HERE](#))

- 2019 IRS Form 1099-MISC for any independent contractors that your business paid (not to exceed \$100,000 for the year) ([HERE](#))

- 2019 IRS Form 1040-C if your business is a sole proprietorship ([HERE](#))

- 2019 IRS Form W-3 (not required, but recommended) ([HERE](#))

- Monthly payroll statements that will provide the following information
 - Salary, wages, commissions, or tips (not exceeding \$100,000 annually for each employee)
 - Any costs for the separation or dismissal of employees
 - Any costs for vacation, parental, family, medical or sick leave
 - Any state & local taxes assessed on employee compensation

If your business pays for health insurance or retirement for employees, you will also need to provide the following from 1099 or W2 forms:

- All health insurance premiums paid by the business owner under a group health plan

- All retirement plan funding paid for by the business owner