



SUGGESTED DOCUMENT CHECKLIST

Final SBA guidance will determine what is needed for a complete application but the information listed below is likely to be required. *In some cases, additional information may be necessary.*

- 2019 IRS Quarterly 940, 941 or 944 payroll tax reports
- Payroll reports for a twelve-month period (ending on your most recent payroll date), which will show the following information:
 - ✓ Gross wages for each employee, including officer(s) if paid W-2 wages
 - ✓ Paid time off for each employee
 - ✓ Vacation pay for each employee
 - ✓ Family medical leave pay for each employee
 - ✓ State and local taxes assessed on an employee's compensation
- 1099s for independent contractors for 2019
- Documentation showing total of all health insurance premiums paid by the company owner(s) under a group health plan.
 - ✓ Include all employees and the company owners
- Document the sum of all retirement plan funding that was paid by the company owner(s) (do not include funding that came from employees out of their paycheck deferrals).
 - ✓ Include all employees and the company owners
 - ✓ Include 401K plans, Simple IRA, SEP IRA's
- If: Self-Employed (Sole Proprietor, LLC)
 - ✓ 2019 Schedule C
 - ✓ Current Profits/Losses

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FOR MORE INFORMATION ABOUT THE SBA PROGRAM GO TO [HOME.TREASURY.GOV/CARES](https://www.home.treasury.gov/cares)

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