

PAYCHECK PROTECTION PROGRAM

Required Documents Checklist

Sole Proprietors | Self Employed
Independent Contractors | Gig Economy Workers

DOCUMENTS REQUIRED

1. Completed Paycheck Protection Program Loan Application (SBA Form 2483), available on SBABizHelp.com
2. Unexpired and legible Photo ID. Must be one of the following
 - U.S. State Driver's License
 - U.S. State Identification Card
 - Permanent Resident Card, plus proof of address**
 - U.S. Passport, plus proof of address**
 - U.S. Military ID, plus proof of address**

** Must be one of the documents listed below and have the same name as it appears on the Photo ID.

Bank Statement - not older than 90 days

Lease Agreement

Medical Bill - not older than 90 days

Real Estate Property Title

Real Estate Tax Bill

Utility Bill – not older than 90 days

Vehicle Registration

Voter's Registration Card

3. Fictitious Name Registration, if applicable
4. Professional License, if applicable

DOCUMENTS REQUIRED TO VALIDATE EARNED INCOME / PAYROLL COSTS

1. Completed Paycheck Protection Program Calculator, using Excel form available on SBABizHelp.com
2. IRS Form 1040 including Schedule C for 2019
3. IRS Form 1099 – Misc for 2019

DOCUMENTS REQUIRED IF YOU HAVE EMPLOYEES

1. IRS Form 940 for 2019
2. IRS Form 941 for all 2019 4 quarters
3. W-2s for all employees for 2019
4. Florida Department of Revenue Employer's Quarterly Report RT-6, for all 2019 4 quarters
5. Payroll records for period including February 15, 2020 or bank statements showing payroll costs for 2020
6. Breakdown of payroll costs associated with benefits:
 - a. Payment for vacation, parental, family, medical, or sick leave
 - b. Allowance for separation or dismissal
 - c. Payment of group healthcare benefits, including insurance premiums
 - d. Payment of retirement benefits

Additional documentation may be required

Updated 4.21.2020