**EXAMPLE APPLICATION**  
Ask your SBA approved banker for their specific checklist.

**PARTIAL SBA LOAN APPLICATION CHECKLIST**

**PAYCHECK PROTECTION PROGRAM**

**APPLICATION ITEMS**

Copies of payroll tax reports file with the IRS (including Forms 941, 940, state income and unemployment

tax filing reports) for the entire year of 2019 and first quarter of 2020 (if available) should be presented.

Copies of payroll reports for each pay period for the preceding 12 months. Such reports should include

gross wages including PTO (which might include vacation, sick, and other PTO). This includes payroll

reports through the pay period preceding the origination of the SBA loan.

Documentation reflecting the health insurance premiums paid by the company under a group health plan

including owners of the company for the immediately preceding 12 months prior to the date of the SBA

loan origination. Copies of the monthly invoices should suffice.

Documentation of all retirement plan funding by the employer for the immediately preceeding 12 months.

Copies of work papers, schedules and remittances to the retirement plan administrator should be sufficient.

Copy of Driver’s License

**CLOSING ITEMS (If the Bank does not already have)**

**Corporate Documents**

Corporation

Articles of Organization

By-laws

Tax ID

DBA if applicable

Limited Liability Company (LLC)

Articles of Organization

Company Agreement/Regulations

Tax ID

DBA if applicable

General Partnership

Partnership Agreement

Tax ID

DBA if applicable

Limited Partnership

Partnership Agreement

Corporate documents as applicable of the General Partner

Tax ID

DBA if applicable