

## **Paycheck Protection Program - Full List of Required Documents**



### **Proof of Payroll:**

1. **Independent Contractor/Self-Employed/Sole Proprietorship with no employees:**
  1. 2019 or 2020 1040 Schedule C
  2. If you are including an Economic Injury Disaster Loan that was taken from 1/31/20-4/3/20 - bank statement showing the deposit into your business account.
  3. Invoice, bank statement, book of record, or a 1099 MISC that covers the period 2/15/20
  4. If you are using 2020 to calculate the loan amount, provide the 2020 1040 Schedule C (if you haven't filed the 2020 taxes yet, you may provide a draft)
  
2. **Sole Proprietorship/Self Employed with employees:**
  1. Payroll/health insurance/retirement benefits for employees: 1040 Schedule C
  2. Form 940 or four 941s
  3. State quarterly wage unemployment insurance tax reporting forms for each quarter
  4. If you are including an Economic Injury Disaster Loan that was taken from 1/31/20-4/3/20 - bank statement showing the deposit into your business account
  5. Bank statement, payroll statement, or similar documentation for the pay period that covered 2/15/20
  
3. **Corporations (& LLCs that file as corporations):**
  1. Form 940 or four 941s
  2. 1120 or 1120-S tax return to substantiate health insurance or retirement benefits to employees
  3. If you are including an Economic Injury Disaster Loan that was taken from 1/31/20-4/3/20 - bank statement showing the deposit into your business account
  4. State quarterly wage unemployment insurance tax reporting forms for each quarter
  5. Bank statement, payroll statement, or similar documentation for the pay period that covered 2/15/20
  6. For owner's income: 1040 Schedule C
  
4. **Partnerships (& LLCs that file as partnerships):**
  1. Form 940 or four 941s
  2. 1065 tax return (including K1's) to substantiate health insurance or retirement benefits to employees, and self-employment earnings for the partners
  3. State quarterly wage unemployment insurance tax reporting forms for each quarter
  4. Invoice, bank statement, book of record, or a 1099 MISC that covers the period 2/15/20
  
5. **Non-profits:**
  1. Form 940 or four 941s
  2. Form 990 showing health insurance and/or retirement plan benefits to employees
  3. State quarterly wage unemployment insurance tax reporting forms for each quarter
  4. Parsonage report (if applicable)

### **Docs needed for proof of revenue reduction (applicant to choose one of the following):**

- 2019 and 2020 Tax forms
- 2019 and 2020 Quarterly income statements (for the same quarter for 2019 and 2020)
- If the business started between 1/1/2020-2/15/2020, quarterly income statements or bank statements for Q2, Q3, or Q4 compared to Q1.
- 2019 and 2020 bank statements (for the same quarter for 2019 and 2020)

### **Voided Check & Driver's License**