
DOCUMENTS TO GATHER FOR YOUR SBA PPP APPLICATION

Both first and second-time borrowers:

If you file IRS Form 1040 Schedule C or 1040 Schedule F:

Gather and prepare to upload the following:

- 2019 or 2020* (whichever you used to calculate loan amount) Form 1040 Schedule C or Form 1040 Schedule F

If you do not have employees:

- 2019 or 2020* (whichever you used to calculate loan amount) IRS Form 1099-MISC detailing nonemployee compensation received (box 7), if applicable
- 2019 or 2020* (whichever you used to calculate loan amount) invoice, bank statement, or book of record that establishes you are self-employed [if 1099 not provided]
- A 2020 invoice, bank statement, or book of record to establish you were in operation on or around February 15, 2020

If you have employees:

- 2019 or 2020* (whichever you used to calculate loan amount) Form 941 (or other tax forms or equivalent payroll processor records containing similar information)
- State quarterly wage unemployment insurance tax reporting forms from each quarter in 2019 or 2020* (whichever you used to calculate loan amount) or equivalent payroll processor records
- A payroll statement or similar documentation from the pay period that covered February 15, 2020 must be provided to establish you were in operation on February 15, 2020

If you file IRS Form 1120-S (S-Corp) or Form 1120 (C-Corp):

Gather and prepare to upload the following:

- 2019 or 2020* (whichever you used to calculate loan amount) IRS Wage and Tax Statements (such as IRS Form 940, IRS Form W-3, or IRS Form W-2s) or equivalent payroll processor records or IRS Form 941 and state quarterly wage unemployment insurance tax reporting form from each quarter
- 2019 or 2020* (whichever you used to calculate loan amount) IRS Form 1120, IRS 1120-S
- Records of any retirement or health insurance contributions
- 2020 Q1 IRS Form 941, a payroll statement, or similar documentation from the pay period that covered February 15, 2020 to establish you were in operation and had employees on that date

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If you file IRS Form 1065 (Partnership):

Gather and prepare to upload the following:

- 2019 or 2020* (whichever you used to calculate loan amount) IRS Form 1065 (including K-1s) and other relevant supporting documentation if the partnership has employees
- 2019 or 2020* (whichever you used to calculate loan amount) IRS Form 941
- State quarterly wage unemployment insurance tax reporting form from each quarter (or equivalent payroll processor records or IRS Wage and Tax Statements)
- Records of any retirement or health insurance contributions
- If the partnership has employees, a payroll statement or similar documentation from the pay period that covered February 15, 2020 must be provided to establish the partnership was in operation and had employees on that date
- If the partnership has no employees, an invoice, bank statement, or book of record establishing the partnership was in operation on February 15, 2020 must instead be provided

If you file IRS Form 990 (Non-Profit):

Gather and prepare to upload the following:

- 2019 or 2020 (whichever you used to calculate loan amount) IRS Wage and Tax Statements (such as IRS Form 940, IRS Form W-3, or IRS Form W-2s) or equivalent payroll processor records or IRS Form 941 and state quarterly wage unemployment insurance tax reporting form from each quarter
- 2019 or 2020* (whichever you used to calculate loan amount) IRS Form 990 Part IX or other documentation of any retirement and health insurance contributions, if applicable
- 2020 Q1 IRS Form-941, a payroll statement, or similar documentation from the pay period that covered February 15, 2020 to establish you were in operation and had employees on that date

Second-time borrowers only:

- Documentation that shows the business experienced a revenue reduction of 25% or greater in 2020 relative to 2019
 - IMPORTANT NOTE: For loan requests of \$150,000 or less, you will not need to provide documentation when you apply for the loan, but you will need to provide documentation when you request forgiveness
- Gather the following information which was provided to you through your Vantage West online banking message center on or about 8/5/2020
 - SBA loan #
 - First PPP loan amount

*If using 2020 to calculate loan amount, this is required regardless of whether you have filed a 2020 tax return with the IRS.

Disclaimer: This is for informational purposes only and may not apply to all borrowers. For the most up to date and accurate guidance visit [SBA.gov](https://www.sba.gov) and [Treasury.gov](https://www.treasury.gov). For your convenience, Vantage West Credit Union provides links on our website to third party sites. Vantage West Credit Union does not provide, and is not responsible for the product, service, or overall website content available at a third party site. Vantage West Credit Union is not liable for any failure of products, services, or information advertised on the third party website. Please be advised that you will no longer be subject to, or under the protection of the privacy and security policies of our website.