



SBA PPP Loan Application Checklist

Information Needed to Apply:

The following documentation will be requested when we contact you to process your application. Reminder, please don't submit any documentation until we contact you to apply.

- Copies of payroll tax reports filed with the IRS (including Forms 941, 944, state income and unemployment tax filing reports) for the entire year of 2019 and first quarter of 2020 (if available)
- Copies of payroll reports for each period in the preceding 12 months. Such reports should include gross wages per employee, vacation, sick, and other PTO payment benefits.
- Entity documents as applicable for your business below:

Corporation:	Limited Liability Company:	General Partnership:
<input type="checkbox"/> Articles of Incorporation <input type="checkbox"/> Bylaws and Amendments <input type="checkbox"/> Statement of Foreign Corporation <i>(only if registered outside of CA)</i> <input type="checkbox"/> Certificate of Entity - to be requested prior to loan documentation <input type="checkbox"/> Fictitious Name Statement <i>(if applicable)</i> <input type="checkbox"/> Certificate of Beneficial Ownership- included as part of this submission	<input type="checkbox"/> Articles of Organization and Amendments <input type="checkbox"/> Operating Agreement and Amendments <input type="checkbox"/> Foreign LLC (LLC-5) <i>(only if registered outside of CA)</i> <input type="checkbox"/> Fictitious Name Statement <i>(if applicable)</i> <input type="checkbox"/> Certificate of Beneficial Ownership- included as part of this submission	<input type="checkbox"/> Partnership Agreement and Amendments <input type="checkbox"/> Statement of Foreign Partnership <i>(only if registered outside of CA)</i> <input type="checkbox"/> Fictitious Name Statement <i>(if applicable)</i> <input type="checkbox"/> Certificate of Beneficial Ownership- included as part of this submission
Limited Partnership:	Limited Liability Partnership:	Sole Proprietorship:
<input type="checkbox"/> Certificate of Limited Partnership <input type="checkbox"/> Foreign LP (LP-5) <i>(only if registered outside of CA)</i> <input type="checkbox"/> Partnership Agreement <input type="checkbox"/> Fictitious Name Statement <i>(if applicable)</i> <input type="checkbox"/> Certificate of Beneficial Ownership- included as part of this submission	<input type="checkbox"/> Application to Register LLP (LLP-1) <input type="checkbox"/> Partnership Agreement and Amendments <input type="checkbox"/> Partnership Agreement <input type="checkbox"/> Fictitious Name Statement <i>(if applicable)</i> <input type="checkbox"/> Certificate of Beneficial Ownership- included as part of this submission	<input type="checkbox"/> Copy of Driver's License- included as part of this submission <input type="checkbox"/> Professional License <input type="checkbox"/> Fictitious Name Statement <i>(if applicable)</i>