

Checklist for COVID-19 EIDL Packets

- SBA Form 5 or SBA Form 5C, as appropriate – all sections complete and signed.
- Complete list of each principal, including any individual owning 20% or more of the business AND any affiliated parties.
- IRS Form 4506-T for each principal, including any individual owning 20% or more of the business AND any affiliated parties.
- Complete copies of all Federal Income Tax Forms for the preceding year including any and all schedules for each principal, including any individual owning 20% or more of the business AND any affiliated parties.
- SBA Form 413 for each principal, including any individual owning 20% or more of the business AND any affiliated parties.
- Complete and attach Schedule of Liabilities – may use SBA Form 2202 or schedules contained on spreadsheets or financial accounting records.
- If tax-exempt, copy of IRS tax-exempt certification.
- A current profit and loss statement (YTD).
- A current balance sheet (YTD).
- Ascertain the request of monies, repayment schedule options – run an amortization table to ensure the borrower is comfortable with the cash flow demands of repayment.
- If SBDC or other person is an authorized representative include information required on Form 5, box 21.

- SBA Form 1368, if required (assume required **UNLESS** physical damage loans are the only request).
- Attach pro forma financial reports, if business has not started generating revenue.
- Detailed but succinct explanations for any YES answers to Box 18 questions.
- Submit online, load all attachments as required, and print copies of the submission when prompted to do so.

Resource Suggestions:

1. If you do not have a scanner but do have a smart phone, consider getting an app that will scan the documents in the correct format. Visit your App Store.
2. For paper copies of some the forms that may be required for your submission
 - a) SBA Form 5 -
<https://www.sba.gov/sites/default/files/Disaster%20Business%20Loan%20Application.pdf>
 - b) SBA Form 413 -
https://www.sba.gov/sites/default/files/forms/SBA_Form_413_7a-504-SBG.pdf
 - c) SBA Form 5C -
[https://disasterloan.sba.gov/ela/Documents/Disaster%20Home%20Loan%20Application%20\(SBA%20Form%205c\).aspx](https://disasterloan.sba.gov/ela/Documents/Disaster%20Home%20Loan%20Application%20(SBA%20Form%205c).aspx)
 - d) IRS Form 4506-T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
 - e) SBA Form 1368
https://www.sba.gov/sites/default/files/forms/serv_da_all_loanapp_5_0.pdf