The SBA loans that will be offered under the CARES Act will be handled through your bank and guaranteed 100% by the SBA. The amount of information you will need to provide for the loan application may differ by lender, but here is a list of documents to gather now that may be required.

- 2019 IRS Quarterly 940, 941, 944 payroll tax reports.
- Payroll reports for a 12-month period (ending on your most recent payroll date). Show the following information:
  - Gross wages for each employee, including officer(s) if paid W-2 wages
  - Paid time off for each employee
  - Vacation pay for each employee
  - Family medical leave pay for each employee
  - State and local taxes assessed on an employee’s compensation
- 1099s for independent contractors for 2019.
- Documentation showing total of all health insurance premiums paid by the company owner(s) under a group health plan.
  - Include all employees and the company owners
- Document the sum of all retirement plan funding that was paid by the company owner(s). Do not include funding that came from employees out of their paycheck deferrals.
  - Include all employees and the company owners
  - Include 401K plans, Simple IRA, SEP IRAs
- Also include:
  - Last three years personal and business tax returns
  - Copy of any professional licenses
  - Articles of Incorporation and bylaws of each entity
  - Driver’s license
  - Certification that all employees live in the United States
  - Most recent 12-month profit and loss statement