

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.