

# Paycheck Protection Program (PPP) Small Business Administration Loan Application Required Document Check List

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Submit supporting documentation of your payroll costs for the **calendar year 2019** to establish maximum loan amount eligibility. Your payroll provider may be of assistance in collecting what you need. Supporting documentation may include documents such as:

- Full year IRS payroll tax filings (e.g., 940, 941, 944) for 2019
- Full year 1099-MISCs for 2019 (*for applicants filing as independent contractors*)
- Full year payroll processor records
- Full year health insurance premium expenses (required if group healthcare costs were included in payroll calculations)
- Full year retirement plan expenses (required if payments into retirement accounts were included in payroll calculations)
- Other full year supporting documentation (e.g., income and expense statements)
- For sole proprietors a copy of their complete 2019 1040 tax return

In addition to the above, the SBA requires documentation supporting your certification that, **as of or around February 15, 2020**, you had employees for whom you paid salaries and payroll taxes (or paid independent contractors), or you are an independent contractor.

- Some examples of qualify documentation to meet the February 15, 2020 requirement would be first quarter 2020 tax filings (940). First quarter 2020 payroll processor records. First quarter bank records that demonstrate a qualifying payroll amount. Internal profit and loss statement.