



Documentation must be submitted to establish eligibility and to support payroll amounts.

## First Draw Required Documentation

- **If you are a Sole Proprietor:**
  - 2019 or 2020\* Form 1040 Schedule C
  - IRS Form 1099-MISC detailing nonemployee compensation received (*if applicable*)
  - If you do not have W-2 employees, a February 2020 bank statement or invoice to establish business was in operation on or around February 15, 2020
  - If you have W-2 employees, please also see below
  
- **If you are a Partnership:**
  - 2019 or 2020\* IRS Form 1065 (*including K-1s for each partner*)
  - If you do not have W-2 employees, a February 2020 bank statement or invoice to establish business was in operation on or around February 15, 2020
  - If you have W-2 employees, please also see below
  
- **If you are a Farmer:**
  - 2019 or 2020\* Form 1040 Schedule F
  - IRS Form 1099-MISC detailing nonemployee compensation (*if applicable*)
  - If you do not have W-2 employees, a February 2020 bank statement or invoice to establish business was in operation on or around February 15, 2020
  - If you have W-2 employees, please also see below
  
- **For ALL entities *that have W-2 employees*, we will require:**
  - 2019 or 2020 Form 941 for each quarter
  - 2019 or 2020 State quarterly wage unemployment insurance tax reporting forms
  - Evidence of any employer contributions to retirement and/or health insurance (if including these costs in the calculation)
  - List of employees with annual gross wages greater than \$100,000
  
- **If you are a new loan customer, the following will be required, in addition to that listed above:**
  - Articles of Incorporation/Organization
  - By Laws
  - Ownership Structure of Business

*\*2020 IRS forms may be submitted in draft format if no changes are expected prior to final submission.*