



## SBA Disaster Relief Loan Checklist

### Required Docs

- Signed Loan application by all owners of 25% or more
- Last 2 years of filed tax returns, if you don't have last year's, you must include the P&L and Balance Sheet for ending for that year and copy of the extension
- Last year's (2019) Payroll forms: W-2, 940, and 4x 941's
- Last 2 years Individual Tax returns of all owner's signing the loan application. If you don't have last year's return, include all W-2's, 1099's and other proof of income for 2019
- Signed SBA Form P-190
- Signed forms 4506-T for every applicant (business and owners)
- Business Debt Schedule (SBA Form 2202)
- Personal Financial Statements for all owners signing the loan (SBA form 413)
- Additional filing requirements providing monthly sales figures (SBA Form 1368)

### Optional:

- YTD Financial statement for 2020 up to the last closing month prior to loan application date
- Statement of explanation of credit report concerns and issues (especially if any of the owners have had a bankruptcy or foreclosures, in the past 7 years)