

## COVID CV-19 MICRO ENTERPRISE ASSISTANCE DOCUMENTATION CHECK LIST

### REQUIRED INCOME DOCUMENTATION

#### Family Income Worksheet – Based on 2019 IRS Income Tax Returns:

\_\_\_\_\_ 2019 Personal Returns 1040 (or 2018 if on extension) including:

\_\_\_\_\_ Schedule C if Sole Proprietor or self employed

\_\_\_\_\_ Schedule E – if income includes rental income

#### **OR if owner(s) did not qualify with 2019 taxes and wish to qualify with prior 8 weeks of income:**

\_\_\_\_\_ 8 consecutive weeks of pay statements

\_\_\_\_\_ Social Security Benefit Letter – Current year

\_\_\_\_\_ 2 consecutive months of bank statements (all pages)

\_\_\_\_\_ Pension (2 months statements or 1099

\_\_\_\_\_ 2 consecutive months Investment Account Statements:  
IRA & 401K Accounts (all pages)

\_\_\_\_\_ Veteran's Benefits

\_\_\_\_\_ Alimony/Child Support – Court Documents

\_\_\_\_\_ Unemployment-Monetary Determination

\_\_\_\_\_ Worker's Compensation

\_\_\_\_\_ Other Income

### REQUIRED SUPPORTING DOCUMENTATION

\_\_\_\_\_ Family Income Worksheet

\_\_\_\_\_ COVID-19 Profit & Loss Worksheet for 2019/2020

\_\_\_\_\_ Proposed Use of Funds Form

\_\_\_\_\_ Duplication of Benefits Statement

\_\_\_\_\_ Payroll Verification Worksheet

\_\_\_\_\_ Completed Application

\_\_\_\_\_ **Additional** Owners Personal Information page (if there is more than 1 owner of the business)

\_\_\_\_\_ Conflict of Interest Certification

\_\_\_\_\_ State and Local Compliance Certification

\_\_\_\_\_ DUNS number will be required for Final Approval – See instructions

\_\_\_\_\_ 2019 (or 2018) IRS **TAX RETURN TRANSCRIPTS (NOT ACCOUNT TRANSCRIPTS)** See instructions

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