

**Information provided courtesy of the Minnesota Central Region Small Business Development Center.**

To prepare when the SBA EIDL loan officer reaches out for you to submit the application, start filling out the following and saving on your desktop to submit when they request it:

**Application | SBA FORM 5 (for partnerships, corporations, limited partnerships, nonprofits, limited liability entity)**

<https://www.sba.gov/sites/default/files/Disaster%20Business%20Loan%20Application.pdf>

- Organization type and legal name; Trade Name if any [Secretary of State registration]
- EIN
- Address and phone numbers
- Date business established
- Number of employees [pre-disaster]
- Insurance coverage [if any] coverage type, name of company and agent
- Owners – names; title; % owned; SSN; marital status, DOB, POB, phone number, address

**Application | SBA FORM 5c (sole proprietors)**

[https://www.sba.gov/sites/default/files/files/serv\\_da\\_sba\\_form\\_5c\\_0\\_0\\_3.pdf](https://www.sba.gov/sites/default/files/files/serv_da_sba_form_5c_0_0_3.pdf)

- Legal names; EIN; DOB; POB; marital status
- Address; phone numbers; emails
- Debts – mortgages, installment loans, student loans, credit cards, insurance, real estate taxes
- Number of employees [pre-disaster]
- Insurance coverage [if any] coverage type, name of company and agent, policy number
- Assets

**Schedule of Liabilities | SBA FORM 2202**

<https://www.sba.gov/sites/default/files/2019-09/2202%20Schedule%20of%20Liabilities.pdf>

- Name of Creditor
- Original Amount
- Original Date
- Current Balance
- Current or Delinquent?
- Maturity Date
- Payment Amount [month-year]
- How secured

**Request to release tax returns | IRS Form 4506t**

<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>

Tax Information Authorization [IRS Form 4506T] for the applicant, principals owning 20% or more of the applicant business, each general partner or managing member; and for any owner who has greater than 50% ownership in an affiliate business. Affiliates include, but are not limited to, business parents, subsidiaries, and/or other businesses with common ownership or management. Information needed:

- Names on tax return
- SSN or EIN
- Current name/address
- Previous address if different

**Personal Financial Statement | SBA Form 413**

[https://www.sba.gov/sites/default/files/forms/SBA\\_Form\\_413\\_7a-504-SBG.pdf](https://www.sba.gov/sites/default/files/forms/SBA_Form_413_7a-504-SBG.pdf)

- Assets
- Liabilities
- Income

**Monthly sales | SBA Form 1368**

[https://www.sba.gov/sites/default/files/files/serv\\_da\\_all\\_loanapp\\_5\\_0\\_4.pdf](https://www.sba.gov/sites/default/files/files/serv_da_all_loanapp_5_0_4.pdf)

- Monthly sales figures beginning 3 years prior to disaster and continuing through the most recent month available
- If not in business for 3 years, complete estimate on page 2
- Add narrative as you see needed \*BRI RECOMMENDS!!!

***These are the attachments that your loan officer may ask for:***

1. Complete copies of the most recent Federal Income Tax Return for the applicant [business]
2. Complete copy, including all schedules, of the most recent Federal income tax return for principals. General partners or managing member, and affiliates.
3. If the most recent Federal income tax return has not been filed, a year-end profit and loss statement and balance sheet for the year
4. A current year-to-date profit and loss statement [within 90 days]
5. Projections [possible]