

## WHAT DO YOU NEED TO APPLY

To apply for this loan, you are required to submit the following information. These forms are available at [www.woodtrust.com](http://www.woodtrust.com). You can also contact your WoodTrust Business Banker for electronic copies of the forms needed. You will also be requested to provide company documentation and supporting financials reports for this loan. Please reference the Documentation Checklist.

DOCUMENTATION CHECKLIST	
<input type="checkbox"/>	1. SBA Application Form 2483 (04/20), Affiliated Business Disclosure Addendum A and if you received an Economic Injury Disaster Loan Information (EIDL), please provide that information
<input type="checkbox"/>	2. To document your payroll calculations, please provide copies of your W-3 Statement, 941 Statements for all quarters of 2019 OR 940 and/or 943 Statements. Also include copies of W-2 Statements for each employee with comp greater than \$100,000 and for foreign employees. Alternatively, you may provide a payroll report for all Employees showing Gross Wages.
<input type="checkbox"/>	3. For Sole Proprietor with no employees, must provide 2019 Tax Return Schedule C; for Independent Contractors must provide copy of 1099-Misc
<input type="checkbox"/>	4. Documentation for your qualified retirement plan contributions such as your plan administrator annual summary report <b>OR</b> a company prepared report. The data must show the employer contribution payments less employee paid portion
<input type="checkbox"/>	5. Documentation for your Group Health plan such as monthly statements <b>OR</b> 2019 Income Statement showing Group Health Expense detail <b>OR</b> Company report/ledger detail showing employer contribution. Do not include the employee paid portion of the group health plan. Note: vision and dental plans should not be included.
<input type="checkbox"/>	6. For applicants that do not have a loan with WoodTrust Bank you will need to provide your company's Articles of Incorporation/Organization, Bylaws/Operating Agreement and copies of Owners (all over 25% ownership) and Controlling person's Driver's License(s). You will also need to complete our Certified Beneficial Ownership form that can be obtained in our downloadable forms.