



# Payment Protection Program Application Process

## Enrichment FCU Document Checklist

### I. Application – SBA Form 2483 (04/20)

[Cannot be fully completed until [Loan Amount Worksheet](#) is completed]

### II. Loan Amount Worksheet & Supporting Documents

The following information is what you will need to complete the Loan Amount Worksheet. You will also need to upload **all** this information to Enrichment Federal Credit Union with your complete application.

Download the [Loan Amount Worksheet](#)

#### FYE 12/31/2019 Financial Statements

- **Income Statement (with details of compensation, benefits, and retirement)**
- **Balance Sheet**

#### Payroll Reports

- **Form 941 – Employer's QUARTERLY Federal Tax Return**
  - Quarter-end 03/31/2019
  - Quarter-end 06/30/2019
  - Quarter-end 09/30/2019
  - Quarter-end 12/31/2019
- **TN Premium and Wage Reporting**
  - Quarter-end 03/31/2019
  - Quarter-end 06/30/2019
  - Quarter-end 09/30/2019
  - Quarter-end 12/31/2019
- **2019 Form 940 – Employer's Annual Federal Unemployment (FUTA) Tax Return [12/31/2019]**
- **2019 Form W-3 Transmittal of Wage and Tax Statements & 2019 Form(s) W-2 Wage and Tax Statements**
  - For all employees with wages >\$100,000:
    - Employee benefits provided during fye 12/31/2019
    - Retirement contributions provided during fye 12/31/2019

### **Self-employed [Sole Proprietors and Independent Contractors]**

- **2019 Income Tax Return**
  - Self-employed – Schedule C
  - Partnership – Form 1065
  
- **2019 FYE Financial Statements**

#### **Next Steps:**

Download and complete your [Loan Amount Worksheet here](#). Save it to your computer.

Complete your [SBA Form Application here](#) and attach your saved worksheet with all supporting documentation before submitting to Enrichment with your signature.

**SBA Form Application**