

PAYCHECK PROTECTION PROGRAM TAX DOCUMENT REQUIREMENTS

Businesses will need to reference data from the following tax documents when completing a loan application related to the Paycheck Protection Program. Applicants should also be prepared to upload digital copies of these documents during the application process.

- IRS Form 941 (4 quarters) or 944 (Annual)
- IRS Form 1099s or 1096 (1099 income)
- IRS Form 1040, Schedule C (sole proprietors)
- IRS Form 1065 plus the K-1's (partnerships)
- Federal Tax Return Schedule C
- Federal Tax Return Schedule F
- IRS Form 990