

Paycheck Protection Program (PPP)

Small Business Administration

Loan Application Common

Required Document Checklist

Submit supporting documentation of your payroll cost for the calendar year 2019 to establish maximum loan amount eligibility. Your payroll provider may be of assistance in collecting what you need.

Here are the common documents with the completed application that your law firm will submit to your lender. **Note: Specifics will be driven by your law firm's lending institution**, but these are the most common documents:

- Substantiation of Payroll Calculation (including other full-year supporting documentation, for example, income and expense statements)
- Full-year IRS payroll tax filings (e.g., 940, 941, 944) for 2019
- Report from Payroll company (or system) processor records
- Payroll reports showing employee-level detail demonstrating the exclusion of over \$100K wages
- Full-year health insurance premium expenses (required if group healthcare costs were included in payroll calculations)
- Full-year retirement plan expenses (required if payments into retirement accounts were included in payroll calculations)

Submit documentation supporting your certification that, as of or around February 15, 2020, you had employees for whom you paid salaries and payroll taxes (or paid independent contractors). Please refer to the list provided above for examples of acceptable documentation.

If you have further questions, Clio and [KORE Accounting Solutions](#) office hours are available to answer your accounting questions, including questions about government funding options. [Book a slot here.](#)

Clio has also partnered with CPN Legal (a Clio Certified Consultant) to host weekly workshops every Thursday at 12:30 pm PT / 3:30 pm ET focused on US government funding programs for small businesses. They'll discuss funding programs available, who might be eligible, how to apply, and how to comply with programs if approved. [Register for a session here](#).

Note: The information in this article applies only to US practices. This post is provided for informational purposes only. It does not constitute legal, business, or accounting advice.