

## **Key Information for Protecting Your Business Due to COVID-19**

### **Items to Compile in Anticipation of Filing a Business Interruption Claim**

- Historical and current annual financial statements
- Federal and state annual tax returns
- Monthly profit and loss statements
- Budgets, forecasts, or projections done prior to and after the event
- Monthly bank statements
- Inventory reports
- Payroll records
- Invoices and purchase orders
- General ledger accounts established to account for any expenses related to the loss such as additional payroll, shipping, temporary facilities, etc.
- Documentation to support extra expenses including receipts, invoices, time sheets, advertising costs, etc.

### **SBA Disaster Relief Loan Filing Requirements**

- [SBA Form 5](#), completed and signed.
- Tax Authorization Form ([IRS Form 4506-T](#)), completed and signed by each applicant, each principal owning 20 percent or more of the applicant business, each general partner or managing member; and, for any owner who has greater than 50 percent ownership in an affiliate business. Affiliates include, but are not limited to, business parents, subsidiaries, and/or other businesses with common ownership or management.
- Complete copies, including all schedules, of the most recent federal income tax returns for the applicant business; an explanation if not available.
- Personal Financial Statement ([SBA Form 413](#)) completed, signed, and dated by the applicant, each principal owning 20 percent or more of the applicant business, and each general partner or managing member.
- Schedule of Liabilities listing all fixed debts ([SBA Form 2202](#) may be used).