



# **8(a) Application Preview**

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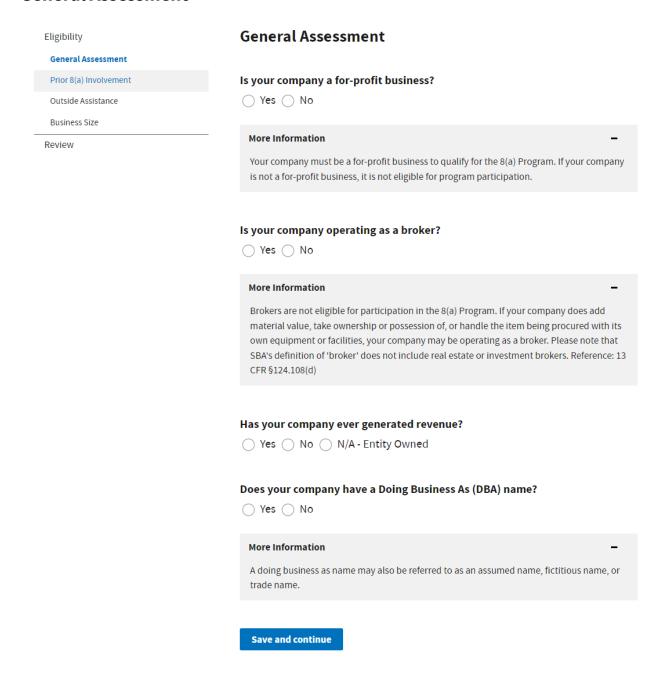
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## 8(a) Initial Application

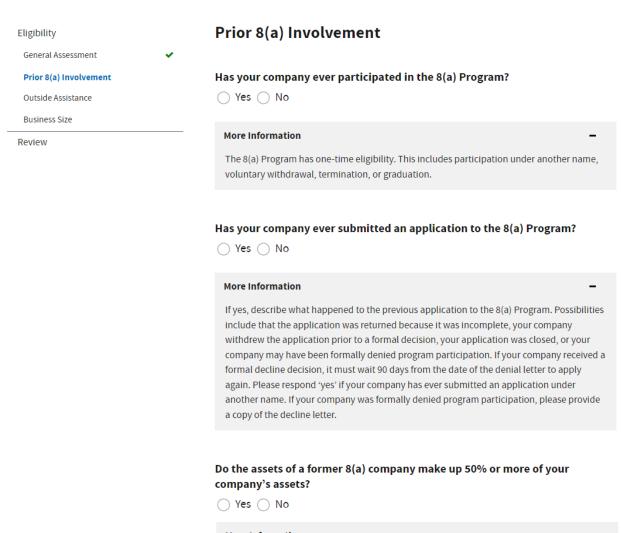
## **Eligibility**

#### **General Assessment**





### Prior 8(a) Involvement



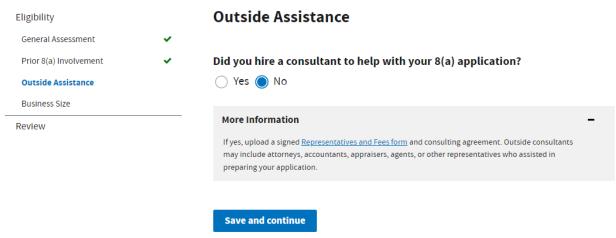
#### More Information

If yes, please provide an explanation above and upload all relevant documentation. The documents should contain the name of the 8(a) Program Participant. Assets may include machinery, contracts, equipment, etc. At the time of application, if the assets of a former 8(a) Program Participant constitute 50% or more of applicant firm's assets, then your business will not be eligible for participation in the program because of one-time eligibility.

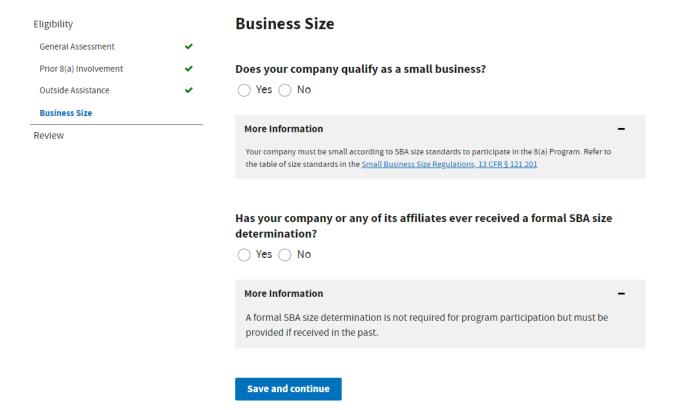
Save and continue



#### **Outside Assistance**



#### **Business Size**





## **Ownership**

## Firm Ownership

Ownership

Firm Ownership

Ownership Details

Corporations

LLCs

Partnerships

Sole Proprietors

Review

### Firm Ownership

#### Please detail the ownership of your company:

Type of Owner	Name	U.S. Citizen	Position in Company	Basis for Disadvantage	Claiming Disadvantage?	Ownership %	Action
No items	added yet						
Total						0%	

**Add Entry** 

• Add documents

#### **More Information**

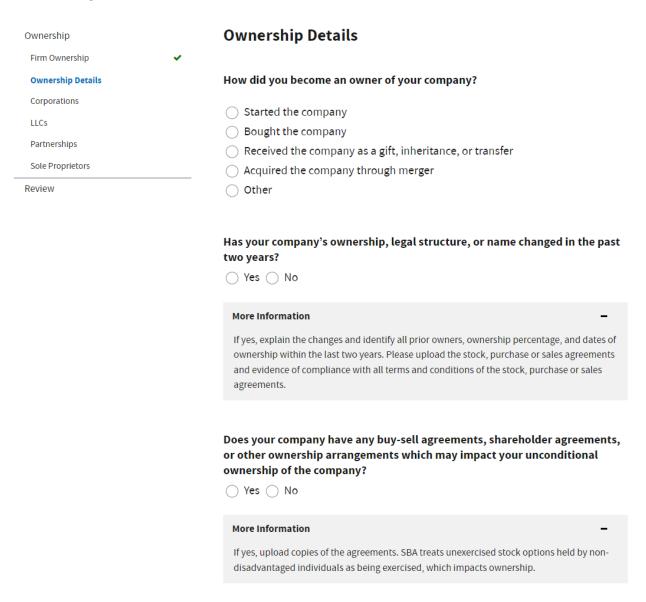
A company is considered entity-owned if it is 51% owned by an American Indian Tribe, Alaska Native Corporation, Community Development Corporation, or Native Hawaiian Organization. If your company is entity-owned, please complete and upload the relevant form 1010 from the following list:

- American Indian Tribe (AIT) form
- Alaska Native Corporation (ANC) form
- Community Development Corporation (CDC) form
- <u>Native Hawaiian Organization (NHO)</u>

Save and continue



### **Ownership Details**





## Does your company currently have ownership interest in any other companies?

○ Yes ○ No ○ N/A - Entity Owned

#### **More Information**

If yes, attach the following information for each company:

- Name
- Address
- Structure (LLC, Corporation, Partnership, Sole Proprietorship)
- Names of the owners, board members, and officers
- · Primary NAICS code
- Nature of relationship
- · Percentage of ownership
- Was the firm ever certified as an 8(a) Participant?
- The last five years of filed Federal tax returns, including all schedules and attachments.
- Most recent year-end financial statements
- Year-to-date financial statements

Please upload a Transmutation agreement if you are married and living in a community property State/Territory-(Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, Wisconsin, Guam, Puerto Rico)

Add documents

#### **More Information**

Community property is owned jointly by a married couple. A transmutation agreement allows for your spouse to change the character of their ownership from community property to separate property.



## Does any other company or organization have more than 10% ownership interest in your company?

○ Yes ○ No ○ N/A - Entity Owned

#### **More Information**

If yes, attach the following information for each company:

- Name
- Address
- Structure (LLC, Corporation, Partnership, Sole Proprietorship)
- Names of the owners, board members, and officers
- · Primary NAICS code
- · Nature of relationship
- · Percentage of ownership
- Was the company ever certified as an 8(a) Participant?

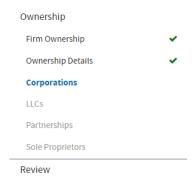
A non-8(a) company that owns at least 10% of a company currently in the 8(a) program may not also own more than a 10% interest in another company applying to the 8(a) program. This restriction does not apply to financial institutions licensed or chartered by federal, state or local government, including investment companies licensed under the Small Business Investment Act of 1958. Reference: 13 C.F.R. § 124.105(h)(1)

Further, a company not currently in the 8(a) program in the same or similar line of business as the company applying to 8(a) may not own more than a 10% interest in the company applying to 8(a). This restriction does not apply to former 8(a) Participants, which are permitted to own up 20% of a company applying to 8(a). Reference: 13 C.F.R. § 124.105(h)(2)

Save and continue



## **Corporations**



### **Corporations**

Please upload the following:

- Articles of Incorporation (original and current version)
- Bylaws (current version)
- Current Shareholder meeting minutes showing the election of the Board of Directors
- · Current Board of Director meeting minutes showing the election of Officers

#### • Add documents

#### **More Information**

Bylaws should show that you have complete control of the company. Common issues include supermajority or unanimous consent voting provisions that could impact complete control of the company. Shareholder and Board meetings must be held in accordance with your company's by-laws and meeting minutes must detail the election of the Board of Directors and the Officers.



#### Please upload the following:

- Stock Certificates (front and back)
- Stock ledger/register
- Transmutation agreements (if married and living in a community property State/Territory-Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, Wisconsin, Guam, Puerto Rico)
- · Voting agreements

#### Add documents

#### More Information

Community property is owned jointly by a married couple. A transmutation agreement allows for your spouse to change the character of their ownership from community property to separate property.

Please upload your company's Certificate of Good Standing (dated within one year)

#### Add documents

#### **More Information**

A **Certificate of Good Standing** is a state-issued document that says your firm is authorized to do business in that state. It is issued by your state's Secretary of State office. Different states use different names for the Certificate of Good Standing. It may also be called a Certificate of Existence or a Certificate of Status.

Save and continue



### Character

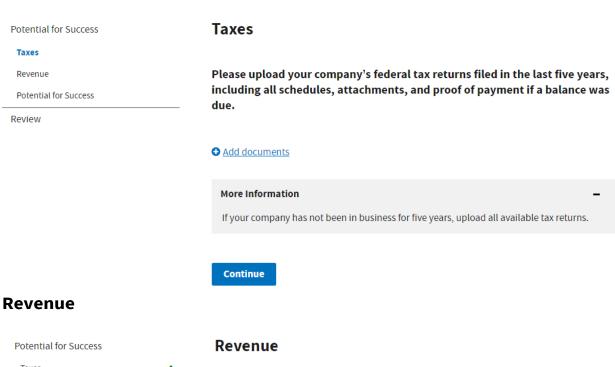
ter	Character
	Is your company a defendant in any pending lawsuits?
	○ Yes ○ No
	More Information
	If yes, please provide a copy of the current status of the lawsuit and a copy of the complaint, answer and and/or counterclaim filed in the suit.
	<ul> <li>A summary of the current status of the lawsuit and claims, including the firm's interest in the suit</li> <li>A copy of the complaint, answer, and/or counterclaim filed in the suit</li> </ul>
	Has your company filed for bankruptcy or insolvency in the last 7 years?  Yes No
	More Information
	If yes, please provide a copy of the bankruptcy court's final order with all schedules and/or discharge.
	Does your company have any outstanding delinquent federal, state, or lo financial obligations or liens?  Yes No
	financial obligations or liens?
	financial obligations or liens?  Yes No
	financial obligations or liens?  Yes No  More Information  Report any obligations, including delinquent tax returns and deliquent SBA loans. If yes, provide all of the
	financial obligations or liens?  Yes No  More Information  Report any obligations, including delinquent tax returns and deliquent SBA loans. If yes, provide all of the follow that apply:  Information about any tax limits and unsatified judgments  Evidence of repayment arrangements
	financial obligations or liens?  Yes No  More Information  Report any obligations, including delinquent tax returns and deliquent SBA loans. If yes, provide all of the follow that apply:  • Information about any tax limits and unsatified judgments
	financial obligations or liens?  Yes No  More Information  Report any obligations, including delinquent tax returns and deliquent SBA loans. If yes, provide all of the follow that apply:  Information about any tax limits and unsatified judgments  Evidence of repayment arrangements  Proof of compliance with repayment arrangements
	financial obligations or liens?  Yes No  More Information  Report any obligations, including delinquent tax returns and deliquent SBA loans. If yes, provide all of the follow that apply:  Information about any tax limits and unsatified judgments  Evidence of repayment arrangements  Proof of compliance with repayment arrangements  Year of tax deliquency and an explanation  If a company or any of its principals fails to pay signifiant overdue debts to the Federal Government, both the company and the principals are not eligible to participate in the 8(a) Business Development program. Examples of debts are unresolved tax liens and defaults on federal loans or other federally assisted financing.
	More Information  Report any obligations, including delinquent tax returns and deliquent SBA loans. If yes, provide all of the follow that apply:  Information about any tax limits and unsatified judgments  Evidence of repayment arrangements  Proof of compliance with repayment arrangements  Year of tax deliquency and an explanation  If a company or any of its principals fails to pay signifiant overdue debts to the Federal Government, both the company and the principals are not eligible to participate in the 8(a) Business Development program. Examples of debts are unresolved tax liens and defaults on federal loans or other federally assisted financing.  Has your company (under any name) ever been debarred or suspended b Federal entity?
	More Information  Report any obligations, including delinquent tax returns and deliquent SBA loans. If yes, provide all of the follow that apply:  Information about any tax limits and unsatified judgments Evidence of repayment arrangements Proof of compliance with repayment arrangements Year of tax deliquency and an explanation  If a company or any of its principals fails to pay signifiant overdue debts to the Federal Government, both the company and the principals are not eligible to participate in the 8(a) Business Development program. Examples of debts are unresolved tax liens and defaults on federal loans or other federally assisted financing.  Has your company (under any name) ever been debarred or suspended b Federal entity?  Yes No

Continue



### **Potential for Success**

#### **Taxes**





## Are you applying for the 8(a) Program under the same primary NAICS code

Are you applying for the 8(a) Program under the same primary NAICS code listed for your company on <u>SAM.gov</u> ♂

$\bigcirc$	Yes	$\bigcirc$	No

#### **More Information**

If no, enter your new primary NAICS code in the explanation field. You must also update your primary NAICS code in SAM.gov.

 $You \ can \ find \ your \ primary \ NAICS \ code \ in \ your \ business \ profile \ on \ Certify. SBA.gov \ or \ SAM.gov.$ 

In most cases, your company's primary NAICS code must account for the largest portion of sales during the most recently completed fiscal year.

Please upload your company's three most recent year-end and current year-to-date financial statements.

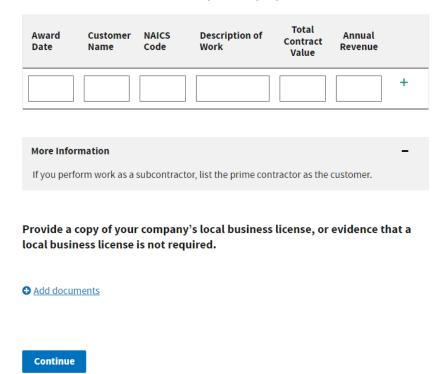
#### Add documents

#### **More Information**

Financial statements must include a balance sheet and a profit and loss statement. The same net income should be included on both the balance sheet and the profit and loss statement. Ensure that equity/retained earnings roll forward correctly from year-to-year. If your company has not been in operation for three years, provide all available financial statements

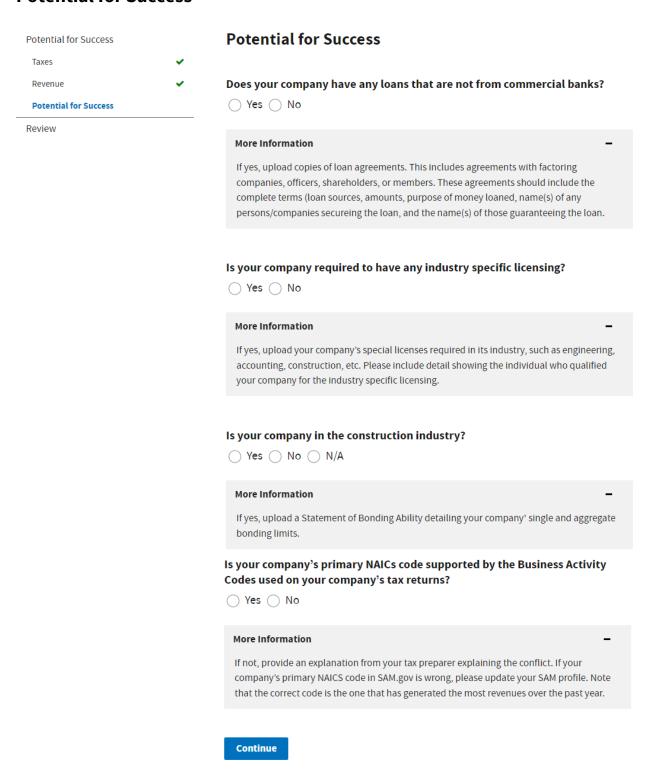


Please list all contracts awarded to your company in the last 12 months.





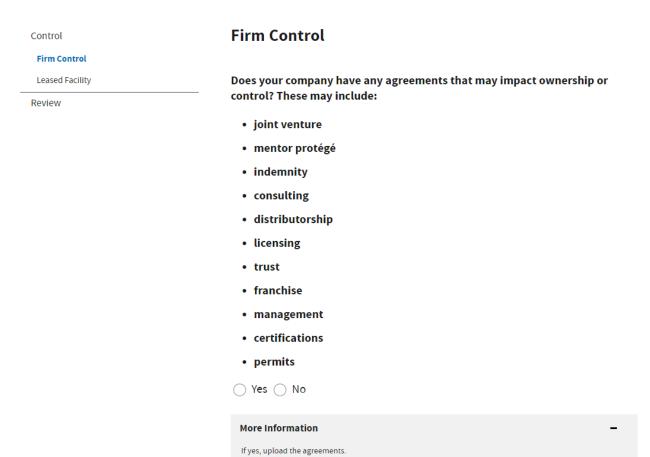
#### **Potential for Success**





## **Control**

#### **Firm Control**





Do any other companies or individuals provide financial support to your company?	
○ Yes ○ No	
More Information -	-
If yes, provide details of the relationship including nature of assistance and copies of any related agreements. Examples include loans, lines of credit, or any other financial support.	
Are you the highest compensated person in your company?	
Yes No N/A - Entity Owned	
More Information -	-
Please provide evidence of who the highest compensated member of your company is. If it is not you, please provide an explanation why that is in the best interest of your company.	
Diagon unique di vicur commoni de husinose honte account signature cond/e)	
Please upload your company's business bank account signature card(s).	
• Add documents	
More Information -	-
A <b>signature card</b> is a document your bank keeps with the signatures of all of the people authorized to access your account. The bank compares future signatures against these signatures to prevent forgeries.	
If your bank does not have a signature card for your account, upload a letter from the bank that shows everyone authorized to sign for each of your firm's bank accounts	
If there are other individuals included on the signature card, provide an explanation of why they need access to the business bank account. You will also need to add them as a contributor at the end of your application because they are identified as a key employee.	
Ooes your company share any locations or resources with any other companies?	
Yes No	
More Information –	•
If so, upload the terms of the agreement. Resources may include may include facilities, equipment, employees, telephone, fax, P.O. Box, office space, or warehouse.	
Ooes your company lease or use office space or other facilities from any ot ompany?	her
Yes No	
More Information –	•
If so, upload the terms of the agreement.	



Continue

## **Leased Facility**



## **Leased Facility**

Do any principals of your company have any financial or familial interest or relationship with the owner of the leased facility?

relationship with the owner of the leased facility?

Yes No

More Information

If yes, provide the name of the other business and the name of the principal who has an interest in or familial relationship with the owner of the leased facility.

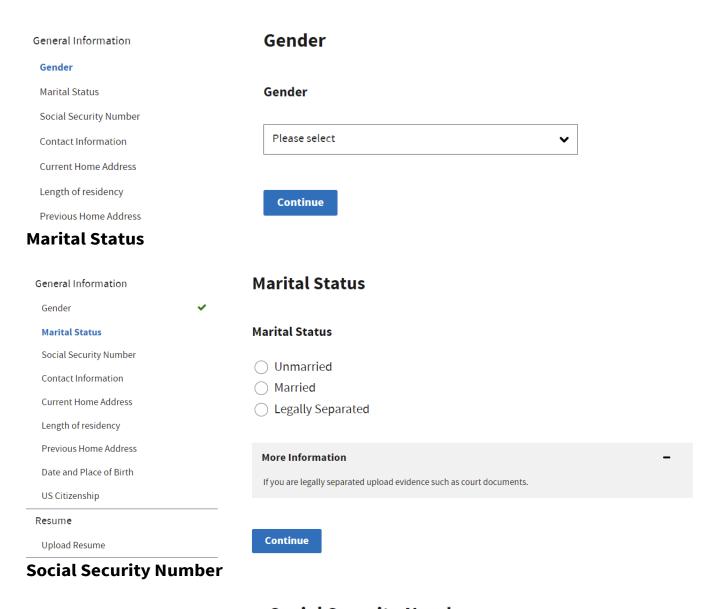
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## **Disadvantaged Individual Questionnaire**

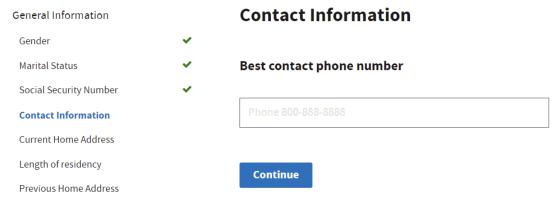
## **General Information**

#### Gender

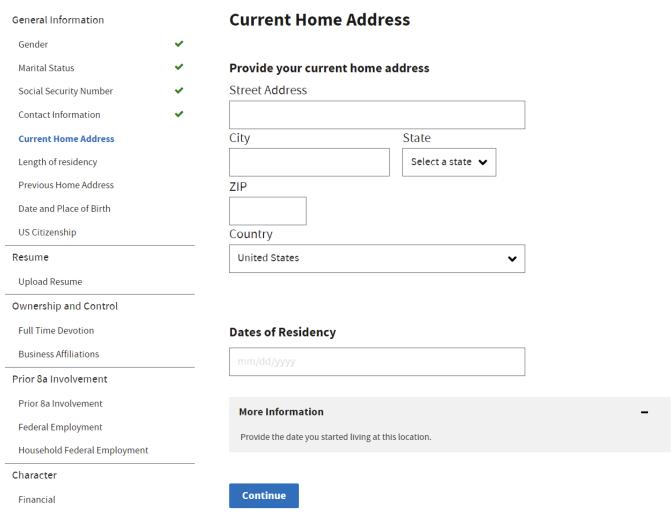




#### **Contact Information**



#### **Current Home Address**

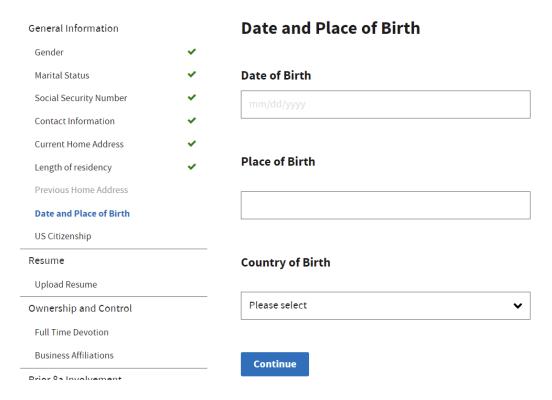


## **Length of residency**





#### **Date and Place of Birth**



## **US Citizenship**



General Information	
Gender	~
Marital Status	<b>~</b>
Social Security Number	<b>~</b>
Contact Information	<b>~</b>
Current Home Address	<b>~</b>
Length of residency	<b>~</b>
Previous Home Address	
Date and Place of Birth	<b>~</b>
US Citizenship	
Resume	
Upload Resume	
Ownership and Control	

### **US Citizenship**

#### Are you a U.S. Citizen?

○ Yes ○ No

#### **More Information**

In order to participate in the 8(a) Business Development program, any individuals claiming disadvantaged status must be U.S. citizens. Reference:  $13 \, \text{CFR} \, \$ \, 124.101$ 

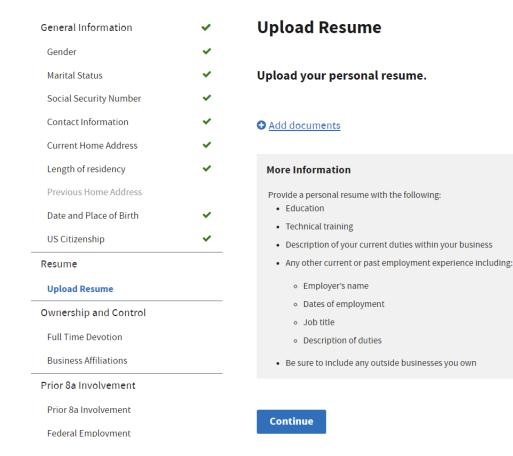
Please upload evidence of U.S. Citizenship. Acceptable evidence includes:

- · U.S. Passport
- · Certificate of Naturalization
- · Consular Report of Birth Abroad of a Citizen of the United States of America (Form FS-240)

Continue

#### Resume

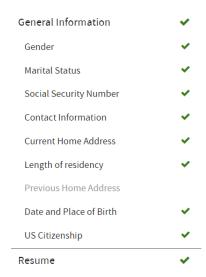
## **Upload Resume**



## **Ownership and Control**



#### **Full Time Devotion**



#### **Full Time Devotion**

Do you have a job outside your company?

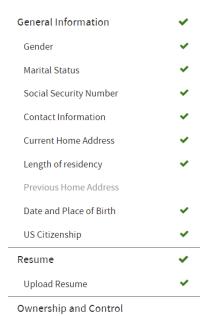
○ Yes ○ No

**More Information** 

If yes, upload an explanation of how your outside employment does not conflict with your day-to-day management of your company. If employed by another company, have your employer provide evidence of your work schedule on company letterhead.

Continue

#### **Business Affiliations**



#### **Business Affiliations**

Do you have ownership or management interest in any other company?

○ Yes ○ No

**More Information** 

If you have an ownership or management interest in any companies outside of your company, please provide the following:

- Proof of Ownership
- Tax Returns 5 Years
- Year-end financial statements 1 year
- Year-to-date financial statements most recent available

 $Management\ interest\ may\ include\ where\ one\ or\ more\ officers,\ directors,\ managing\ members,\ or\ partners\ who\ control\ the\ board\ of\ directors\ and/or\ management\ of\ one\ concern\ also\ control\ the\ board\ of\ directors\ or\ management\ of\ one\ or\ more\ other\ concerns.$ 



## **Business Affiliations** Prior 8a Involvement Prior 8a Involvement Federal Employment Household Federal Employment Character Financial Criminal History Criminal History Documentation Basis of Disadvantage Basis of Disadvantage. Native American Documentation Other Basis of Disadvantage Social Narrative Economic Disadvantage Transfer Assets Financial Data

## Do any of your immediate family members own a company that does business with your company?

○ Yes ○ No

#### **More Information**

If your immediate family members own a company that does business with your company, please provide the following:

- · Family member name
- · Family member relationship to you
- · Family member role in company that does business with your company
- Detail of contractual relationship
- · Company name
- Company EUI
- · Company 8(a) prior participation status
- Detail of any common ownership or management of your company by the family member

Immediate family members include your father, mother, husband, wife, son, daughter, brother, sister, grandfather, grandmother, grandson, granddaughter, father-in-law, and mother-in-law.

Continue

#### **Prior 8a Involvement**

#### **Prior 8a Involvement**

General Information	<b>~</b>
Gender	<b>~</b>
Marital Status	~
Social Security Number	<b>~</b>
Contact Information	•
Current Home Address	<b>~</b>
Length of residency	<b>~</b>
Previous Home Address	
Date and Place of Birth	<b>~</b>
US Citizenship	<b>~</b>
Resume	<b>~</b>
Upload Resume	~
Ownership and Control	~

#### **Prior 8a Involvement**

Have you, or any company you owned, ever applied for certification in the 8(a) program?

More Information

Answer yes if you withdrew an application or had an application formally denied.

Please provide the following:

Company name
Company Unique Entity Identifier
Detail of company ownership
Company NAICS code approved under
Any additional relevant information



Business Affiliations	~	Have you already used your one-time only 8(a) eligibility to qualify a business for the 8(a) Program?
Prior 8a Involvement		○ Yes ○ No
Prior 8a Involvement		
Federal Employment		More Information —
Household Federal Employment		One-time only 8(a) eligibility means any company or individual that has already used their disadvantaged
Character		status to participate in the 8(a) Program is not eligible to participate again.
Financial		
Criminal History		Have any of your immediate family members ever owned a company that was
Criminal History Documentation		admitted to the 8(a) Program?
Basis of Disadvantage		○ Yes ○ No
Basis of Disadvantage.		
Native American Documentation		More Information -
Other Basis of Disadvantage		If your immediate family members own a company that was admitted to the 8(a) Program, please provide the followin
Social Narrative		Company name
Economic Disadvantage		Company primary NAICS code during participation in 8(a) Program
Transfer Assets		Company EUI
Financial Data		<ul> <li>Business relationship with your company</li> <li>Detail of any common ownership or management of your company by the family member</li> </ul>
Cash On Hand		Immediate family members include your father, mother, husband, wife, son, daughter, brother, sister,
Other Sources Of Income		grandfather, grandmother, grandson, granddaughter, father-in-law, and mother-in-law
Notes Receivable		
Retirement Accounts		Continue
Endoral Employmo	nt	

### Federal Employment

General Information	✓	Federal Employment
Gender	<b>✓</b>	
Marital Status	~	Are you a Federal Government employee?
Social Security Number	<b>~</b>	○ Yes ○ No
Contact Information	~	
Current Home Address	~	More Information —
Length of residency	~	The Federal Acquisition Regulation Subpart 3.6 or places restrictions on Federal Government employees which may prevent your company from acquiring contracts or create conflicts of interest. In addition,
Previous Home Address		there are limitations on SBA's ability to provide assistance to government employees. Reference 13 CFR
Date and Place of Birth	<b>~</b>	105.301.
US Citizenship	~	
Resume	✓	Continue

## **Household Federal Employment**



General Information	<b>~</b>	Household Federal Employment
Gender	~	
Marital Status	~	Is any member of your household a Federal Government employee?
Social Security Number	~	○ Yes ○ No
Contact Information	~	
Current Home Address	~	More Information –
Length of residency	~	If yes, please provide a letter of no objection from the federal agency employing the family member. Reference: 13 C.F.R. § 105.301
Previous Home Address		20 0.1.11.1 3 200.002
Date and Place of Birth	~	
US Citizenship	~	Continue

## Character

## Financial

General Information	✓ Financial
Gender	•
Marital Status	Have you filed for personal bankruptcy in the last 7 years?
Social Security Number	✓ Yes ○ No
Contact Information	•
Current Home Address	✓ More Information
Length of residency	If yes, please provide an explanation and attach a copy of the bankruptcy court's final order or discharge
Previous Home Address	
Date and Place of Birth	Have you previously obtained an SBA loan?
US Citizenship	Yes No
Resume	<u></u>
Upload Resume	✓ More Information
Ownership and Control	<ul> <li>If yes, please provide the following borrower details:</li> <li>Name of borrower</li> </ul>
Full Time Devotion	Date approved (or estimated date)
Business Affiliations	<ul> <li>◆ Current status of loan</li> </ul>
Prior 8a Involvement	<b>✓</b>
Prior 8a Involvement	Are you a party to a pending civil lawsuit?
Federal Employment	Yes No
Household Federal Employment	•
Character	More Information
Financial	If yes, please provide the following details about the lawsuit:
Criminal History	Your interest in the suit     Summary of the claims
Criminal History Documentation	Summary of the claims     Current status of the suit



Basis of Disadvantage.

Native American Documentation

Other Basis of Disadvantage

Social Narrative

Economic Disadvantage

Transfer Assets

Financial Data

Financial Data

Cash On Hand

Other Sources Of Income

Notes Receivable

Retirement Accounts

Life Insurance

Stocks & Bonds

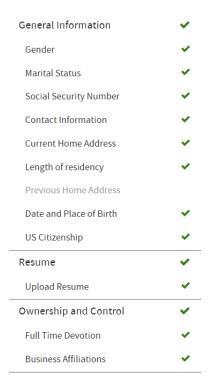
Real Estate - Primary Residence

Real Estate - Other

Personal Property

Notes Payable and Other Liabilities

## **Criminal History**



#### Are you delinquent in paying or filing any of the following:

- Federal or Federally guaranteed obligations (including Federal student loans)
- Business taxes or liens
- Personal Federal, State, or local tax returns

$\overline{}$		
( )	Yes	N

#### **More Information**

If yes, please provide the following details and upload supporting documentation for EACH delinquency:

- · Explanation of the delinquency
- · Type of delinquency
- Status of delinquency (e.g., dismissed, satisfied)
- · Details of the repayment arrangement
- · Compliance with repayment of taxes
- · Deferred payment status for student loans

Continue

### **Criminal History**

#### Have you ever gone by any other names?

More Information	-
If yes, provide detail of your other names	

Are you presently subject to an indictment, criminal information, arraignment, or other means by which formal criminal charges are brought in any jurisdiction?

Ves	$\bigcirc$	No
163		140

Have you been arrested in the past six months for any criminal offense?

$\bigcirc$	Yes	$\bigcirc$	No
$\sim$			





Economic Disadvantage

For any criminal offense, including expunged records, have you ever:

- Been convicted
- Plead guilty
- Plead nolo contendere
- Been placed on pretrial diversion
- Been placed on any form of parole or probation (including probation before judgement)

Yes	No

More Information –

Do not include minor motor vehicle violations such as speeding and equipment violations.

Continue

## **Criminal History Documentation**

General Information	•
Gender	~
Marital Status	~
Social Security Number	~
Contact Information	~
Current Home Address	~
Length of residency	~
Previous Home Address	
Date and Place of Birth	~
US Citizenship	~
Resume	~
Upload Resume	~
Ownership and Control	~
Full Time Devotion	~
Business Affiliations	~
Prior 8a Involvement	~
Prior 8a Involvement	~
Federal Employment	~
Household Federal Employment	~

### **Criminal History Documentation**

Upload a narrative for each arrest, conviction, or incident involving formal criminal charges brought against you.

Add documents

More Information —

Narratives should include the following details for the arrest, conviction, or charges against you:

Date
Location
Fine
Sentence
Whether offense was a Misdemeanor or Felony
Dates of parole or probation
List any unpaid fines or penalties
Name you were charged under
Any other pertinent information

Upload copies of all relevant court dispositions or documents.

Add documents



Character



Continue

## **Basis of Disadvantage**

### **Basis of Disadvantage**



### Basis of Disadvantage.

Select one of the following "presumed disadvantaged groups" as the basis of your social disadvantage.



#### **More Information**

Socially disadvantaged individuals are those who have been subjected to racial or ethnic prejudice or cultural bias within American society because of their identities as members of groups and without regard to their individual qualities. The following individuals are presumed socially disadvantaged:

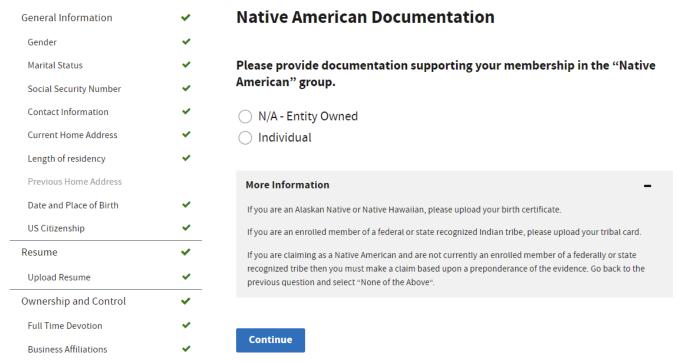
- Black Americans
- Hispanic Americans (South America, Central America, Mexico, Cuba, the Dominican Republic, Puerto Rico, Spain, and Portugal)
- Native Americans (Alaskan Natives, Native Hawaiian, enrolled member of federally or state recognized Indian Tribe)
- Asian Pacific Americans (Burma, Thailand, Malaysia, Indonesia, Singapore, Brunei, Japan, China, Hong Kong, Taiwan, Laos, Cambodia, Kampuchea, Vietnam, Korea, The Philippines, U.S. Trust Territory of the Pacific Islands, Republic of Palau, Republic of the Marshall Islands, Federated States of Micronesia, the Commonwealth of the Northern Mariana Islands, Guam, Samoa, Macao, Fiji, Tonga, Kiribati, Tuvalu, Nauru)
- Subcontinent Asian Americans (India, Pakistan, Bangladesh, Sri Lanka, Bhutan, the Maldives Islands, Nepal)

NOTE: Being born in a country does not, by itself, suffice to make the birth country an individual's country of origin for purposes of being included within a designated group. An individual who is not a member of one of these groups must establish individual social disadvantage by a preponderance of the evidence. 13 C.F.R. § 124.103(c).

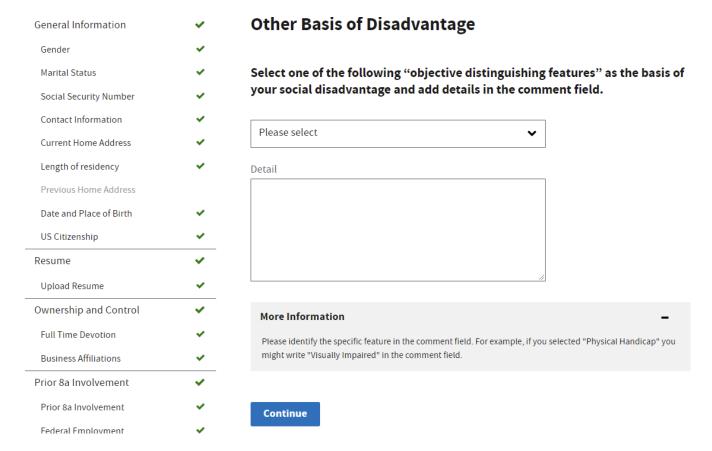
Continue

#### **Native American Documentation**





### Other Basis of Disadvantage



#### **Social Narrative**



General Information	~
Gender	~
Marital Status	~
Social Security Number	~
Contact Information	~
Current Home Address	~
Length of residency	~
Previous Home Address	
Date and Place of Birth	~
US Citizenship	~
Resume	~
Upload Resume	~
Ownership and Control	~
Full Time Devotion	~
Business Affiliations	~
Prior 8a Involvement	~
Prior 8a Involvement	~
Federal Employment	~
Household Federal Employment	~
Character	~
Financial	~
Criminal History	~
Criminal History Documentation	~
Basis of Disadvantage	
Basis of Disadvantage.	~
Native American Documentation	
Other Basis of Disadvantage	~

## **Social Narrative**

Please attach a narrative statement providing specific claims, incidents of bias, or discriminatory conduct directed towards you.

#### Add documents

Continue

More Information –
Please provide the following details in your narrative:  When and where each incident occurred
Who committed the act
How the incident took place
How the incident negatively impacted your entry into or advancement in the business world
Other guidance for narrative:
Narrative should be three pages or less.
<ul> <li>Your disadvantage must be rooted in treatment you received in American society (not another country) and must be chronic and substantial.</li> </ul>
The disadvantage must have negatively impacted your entry or advancement in the business world.
<ul> <li>Experiences should be related to education, employment and business history (including current or previously owned companies).</li> </ul>
<ul> <li>Education - SBA considers such factors as denial of equal access to institutions of higher education, exclusion from social and professional association with students or teachers, denial of educational honors rightfully earned, and social patterns or pressures which discouraged the individual from pursuing a professional or business education.</li> </ul>
<ul> <li>Employment - SBA considers such factors as unequal treatment in hiring, promotions and other aspects of professional advancement, pay and fringe benefits, and other terms and conditions of employment; retailatory or discriminatory behavior by an employer; and social patterns or pressures which have channeled the individual into nonprofessional or non-business fields.</li> </ul>
<ul> <li>Business history - SBA considers such factors as unequal access to credit or capital, acquisition of credit or capital under commercially unfavorable circumstances, unequal treatment in opportunities for government contracts or other work, unequal treatment by potential customers and business associates, and exclusion from business or professional organizations.</li> </ul>

## **Economic Disadvantage**

## **Transfer Assets**



General Information	~
Gender	~
Marital Status	~
Social Security Number	~
Contact Information	~
Current Home Address	~
Length of residency	~
Previous Home Address	
Date and Place of Birth	~
US Citizenship	~
Resume	~
Upload Resume	~
Oversambia and Combani	
Ownership and Control	•
Full Time Devotion	•
·	<b>*</b>
Full Time Devotion	* *
Full Time Devotion Business Affiliations	· · · · · · · · · · · · · · · · · · ·
Full Time Devotion Business Affiliations  Prior 8a Involvement	*

#### **Financial Data**

General Information	<b>~</b>
Gender	~
Marital Status	~
Social Security Number	~
Contact Information	~
Current Home Address	~
Length of residency	<b>~</b>
Previous Home Address	
Date and Place of Birth	~
US Citizenship	~
Resume	~
Resume Upload Resume	<b>*</b>
	* * * * * * * * * * * * * * * * * * *
Upload Resume	· · · · · · · · · · · · · · · · · · ·
Upload Resume  Ownership and Control	· · · · · · · · · · · · · · · · · · ·

#### **Transfer Assets**

Have you transferred any assets to any immediate family member for less than fair market value in the last two years?

				- 1		
Moi	re li	า†ก	rm	ati	inn	

If yes, please provide the following details about the transfer.

- Nature and value of asset
- Details of the transfer (including sale price)
- · Recipient name
- Relationship to recipient

Fair market value is the price that property would sell for on the open market. It is the price that would be agreed upon between a willing buyer and a willing seller, with neither being required to act and both having reasonable knowledge of the relevant facts.

Immediate family members include your father, mother, husband, wife, son, daughter, brother, sister, grandfather, grandmother, grandson, granddaughter, father-in-law, and mother-in-law. Reference: CFR §

Continue

#### **Tax Returns**

- Upload your Individual Income Tax Returns for the last three completed tax years. Include all Schedules and attachments.
- 2. Upload your Wage and Tax Statements (W-2s) for the last three years. If you filed your tax return jointly with a spouse, upload your spouse's W-2s for the last three years, as well.
- 3. If you owed taxes, upload evidence of payment. (This may be a bank statement or <u>IRS Tax</u>
  <u>Account Transcript</u>)
- N/A Entity Owned
- Individual

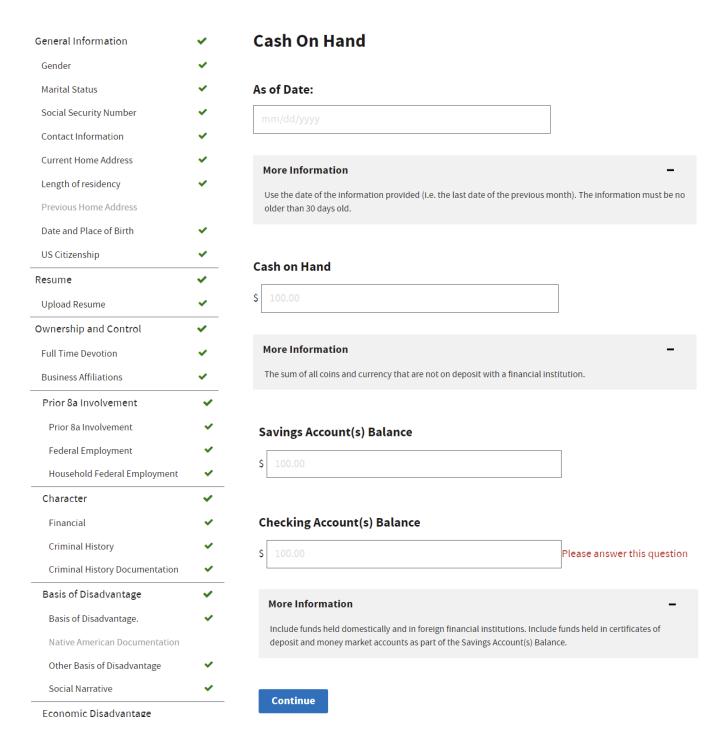
#### More Information

Please provide all W-2 forms, schedules, forms, statements, and 1099s accompanying the tax returns. If you file jointly with the individual claiming disadvantage, do not upload duplicate documents. You may still need to upload your individual W-2.

Continue

#### Cash on Hand





#### Other Sources of Income



General Information	<b>~</b>
Gender	<b>~</b>
Marital Status	~
Social Security Number	~
Contact Information	~
Current Home Address	~
Length of residency	~
Previous Home Address	
Date and Place of Birth	~
US Citizenship	~
Resume	~
Upload Resume	~
Ownership and Control	<b>~</b>
Full Time Devotion	~
Business Affiliations	~
Prior 8a Involvement	<b>~</b>
Prior 8a Involvement	~
Federal Employment	~
Household Federal Employment	~
Character	~
Financial	~
Criminal History	~
Criminal History Documentation	~
Basis of Disadvantage	~
Basis of Disadvantage.	~
Native American Documentation	
Other Basis of Disadvantage	~
Social Narrative	~
Economic Disadvantage	
Transfer Assets	~
Financial Data	
Cash On Hand	•
Other Sources Of Income	
Notes Receivable	
Retirement Accounts	
1.7	

#### **Other Sources Of Income**

#### Salary

100.00

#### **More Information**

Include yearly salary from applicant company or other salaried positions.

#### Other Income

\$ 100.00

#### **More Information**

Include income from any other sources not identified elsewhere, such as retirement/pension or disability income. Do not include investment or real estate income, which are detailed in another section. Alimony or child support payments should not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income. If you have other income, please describe the source in the comment box.

#### **Equity in your company**

\$ 100.00

#### **More Information**

This is the value of your equity interest in your company. Use your company's current balance sheet to determine your equity interest. The value of your equity interest equals the company's net worth multiplied by your ownership percentage.

#### Your Equity in Other companies

\$ 100.00

#### **More Information**

This is the value of the individual's equity interest in companies other than your business. Use the companies' current balance sheets to determine the value of the individual's equity interests. The value of individual's equity interest equals the company's net worth multiplied by the individual's ownership percentage. The amount on this line should be the sum of the individual's equity interests in all companies other than your business.

Continue

#### **Notes Receivable**

Life Insurance



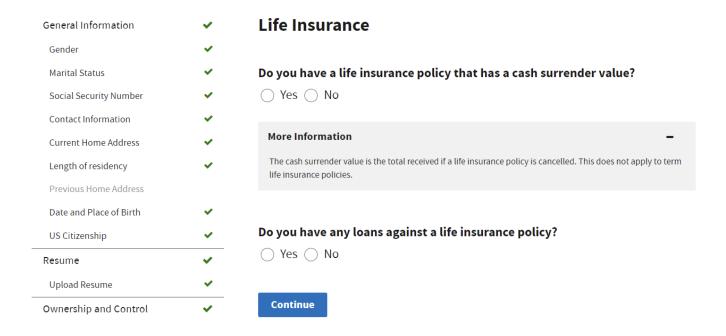
<b>~</b>	
<b>~</b>	Do you have any notes receivable from others?
•	○ Yes ○ No
•	
<b>~</b>	More Information –
•	Include shareholder/officer/member/partner loans from individual to applicant company, as well as any loans given to other individuals or companies.
	given to other individuals of companies.
•	
<b>~</b>	Continue
	* * * * * * * * * * * * * * * * * * * *

## **Retirement Accounts**

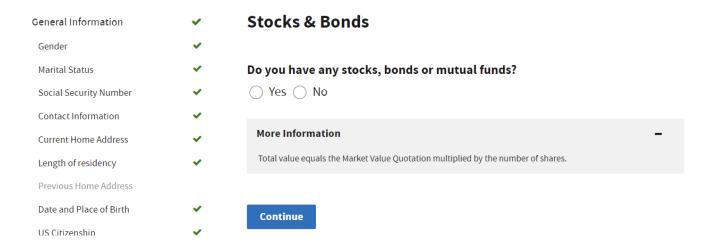
General Information	<b>~</b>	Retirement Accounts
Gender	<b>~</b>	
Marital Status	<b>~</b>	Do you have a Roth IRA?
Social Security Number	<b>~</b>	○ Yes ○ No
Contact Information	<b>~</b>	
Current Home Address	<b>~</b>	More Information –
Length of residency	<b>✓</b>	If yes, upload information on the terms and restrictions of the account. Supplying the most recent account statement from your IRA provider will suffice in most cases. SBA will not include the funds in calculating your
Previous Home Address		net worth if the statement indicates that the funds are not available until retirement age without a significant
Date and Place of Birth	<b>~</b>	penalty.
US Citizenship	<b>✓</b>	
Resume	<b>~</b>	Do you have any other retirement accounts?
Upload Resume	<b>~</b>	○ Yes ○ No
Ownership and Control	<b>✓</b>	
Full Time Devotion	<b>~</b>	More Information –
Business Affiliations	<b>~</b>	If yes, upload information on the terms and restrictions of the account. Supplying the most recent account statement from your IRA provider will suffice in most cases. SBA will not include the funds in calculating your
Prior 8a Involvement	✓	net worth if the statement indicates that the funds are not available until retirement age without a significant penalty.
Prior 8a Involvement	~	
Federal Employment	<b>~</b>	
Household Federal Employment	~	Continue

## Life Insurance





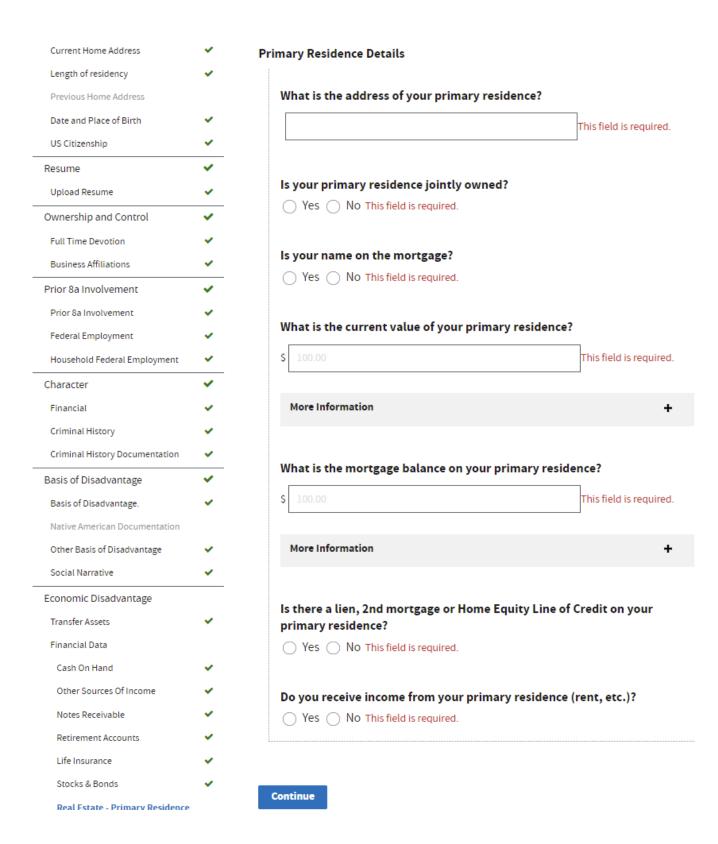
### Stocks & Bonds



### Real Estate - Primary Residence

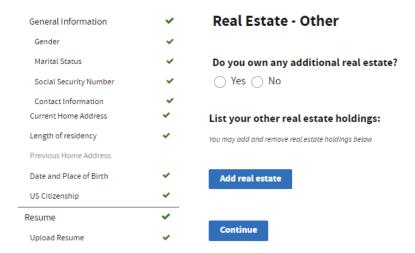






#### Real Estate - Other





## **Personal Property**



## **Personal Property**

#### Do you own any vehicles?

Edit

○ Yes ○ No

Current Value	Loan Balance 🗼	Description of Asset	4				
No data available in table							
\$0.00	\$0.00						

#### Do you own any other personal property or assets?

Delete

New	Euit	Det	ece		
Current	Value	<b>A</b>	Loan Balance \$	Description of Asset	\$
			No data available in tal	ble	
\$0.00			\$0.00		

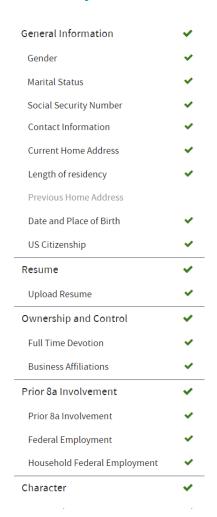
#### **More Information**

Include all household goods, jewelry, art, boats, antiques, etc with a value over \$2,500. (For example, enter a line for household furnishing with the total value of all furniture.) Include any assets held by a revocable trust for which you are the grantor and beneficiary. If the property is jointly owned, include only the individual's share of the property.

Continue



## Notes Payable and Other Liabilities



## **Notes Payable and Other Liabilities**

Do you have any notes payable or other liabilities?

) 103	<u> </u>					
New	Edit	Delete				
Type ^	Original Balance	Current Balance	Payment Amount	How Secured or Endorsed Type of Collateral	Name of Note † Holder	Address of Noteholder
		N	o data availabl	e in table		
Total:		\$0.00				

#### More Information

○ Yes ○ No

List any notes payable including credit cards and personal lines of credit. Include loans owed to your business, other companies, and individuals. Exclude mortgage and vehicle loans, etc. if listed in previous sections. If you have additional liens or debts against your vehicles or personal property, list them. List all other liabilities, including accounts payable. Do not include contingent liabilities.

Continue

#### **Assessed Taxes**

General Information	✓	Assessed Taxes
Gender	~	
Marital Status	~	Do you have any Assessed Taxes that were unpaid?
Social Security Number	•	○ Yes ○ No



Contact Information	~
Current Home Address	~
Length of residency	~
Previous Home Address	
Date and Place of Birth	~
US Citizenship	~
Resume	~
Upload Resume	~
Upload Resume  Ownership and Control	<b>*</b>
<u> </u>	·
Ownership and Control	· · · · · · · · · · · · · · · · · · ·
Ownership and Control Full Time Devotion	· · · · · · · · · · · · · · · · · · ·
Ownership and Control  Full Time Devotion  Business Affiliations	· · · · · · · · · · · · · · · · · · ·

New Edit	Delete					
Whom Payable ^	Amount	When Due \$	Property (if any) a tax lien attaches			
No data available in table						
Total:	\$0.00					

#### **More Information**

Include only assessed taxes that are unpaid. This includes past due personal Federal, state, county, and city taxes. Do not include estimated taxes or business taxes. If this is a joint debt, include only the individual's share of the debt.

Continue

