



# **8(a) Application Preview**





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# **Basic Eligibility**

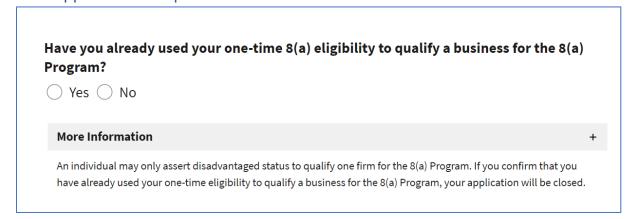
#### Revenue

Has your company ever generated revenue?  Yes No Not Applicable	
More Information	+
Your company must demonstrate potential for success by showing that it has been in business will need to request a waiver of this requirement. If your business has not yet generated revenue waiver. Reference: 13 CFR § 124.107.	

#### **Prior Company Participation**

_		
H	las your company ever participated in the 8(a) Program?	
(	○ Yes ○ No	
	More Information	4
	A company can only participate in the 8(a) Program one time. This includes participation under another name, voluntary withdrawal, termination, or graduation. If your company has already used its one-time eligibility, your application will be automatically closed.	

# **Prior Applicant Participation**







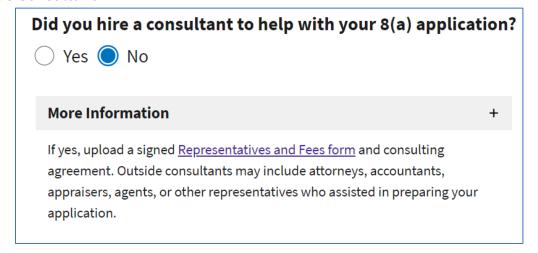
#### Assets from Prior 8(a) Participant



#### **Resource Partner**



#### **Outside Consultant**







#### U.S. 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 CFR § 124.101	
If you were born outside the United States, upload evidence of your U.S. Citizenship. Acceptable evidence includes:	
• U.S. Passport	
Certificate of Naturalization	
<ul> <li>Consular Report of Birth Abroad of a Citizen of the United States of America (Form FS-240)</li> </ul>	

# **Ownership**

#### Ownership Table

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

Type of Owner	Name	Claiming Disadvantage?	Basis for Disadvantage	Ownership %	Action
Individual Primary Owner	Sdf	Yes	Black American	100%	
Total				100%	

**Add Entry** 

Add documents

#### **More Information**

 $\label{lem:Add-an-entry} Add an entry for each owner of your company. An owner can be another individual or another company.$ 

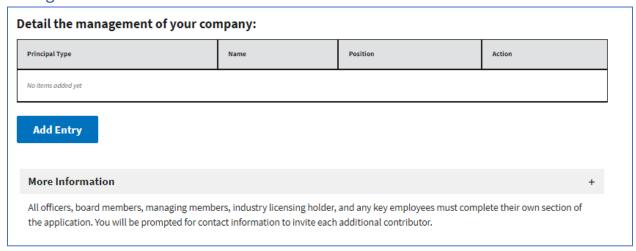
A company is considered entity-owned if it is 51% owned by an American Indian Tribe, Alaska Native Corporation, Community Development Corporation, or Native Hawaiian Organization. Entity-owned companies have specific requirements for the 8(a) Program. If your company is entity-owned, please complete 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
- Native Hawaiian Organization (NHO)

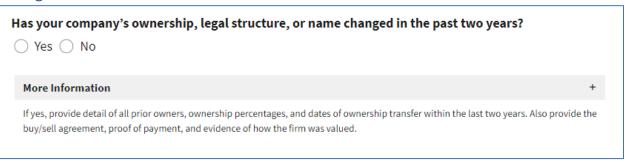


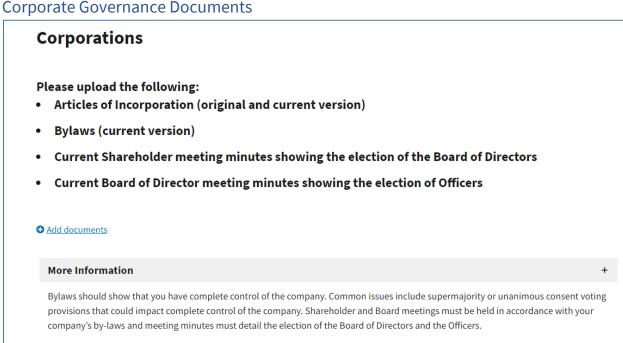


#### Management Table



#### Change in Last Two Years









#### **LLC Governance Documents**

#### Please upload the following:

- Articles of Organization (including amended versions if applicable)
- Operating Agreement (current version)
- · Meeting minutes showing the election of the current Directors and Officers, if applicable
- Membership shares and ledgers, if applicable
- Transmutation agreement if you live in a community property State/Territory (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, Wisconsin, Guam, Puerto Rico.)



#### **More Information**

Operating agreement should show that you have complete control of the company. Common issues requiring revision include supermajority and unanimous consent voting provisions that undermine the owner's complete control of the company. Operating agreements are required for SBA to determine the control of the company regardless of local or State requirements.

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.

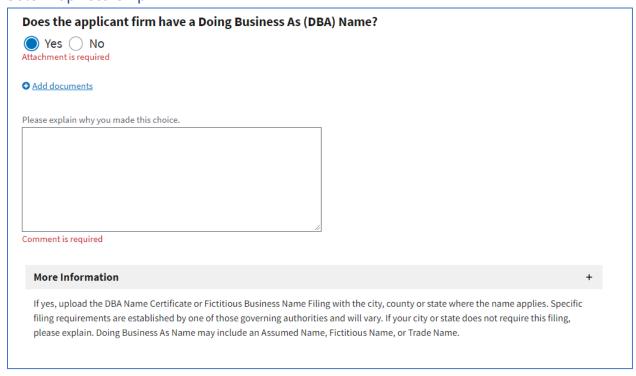
#### **Partnership Governance Documents**

# Please upload your Partnership Agreement. Add documents More Information + One or more individual(s) claiming disadvantaged status must serve as general partners, with control over all partnership decisions. A partnership in which no individual claiming disadvantaged status is a general partner will be ineligible for participation. Reference: 13 CFR §124.105(b).





#### Sole Proprietorship DBA



#### **Certificate of Good Standing**

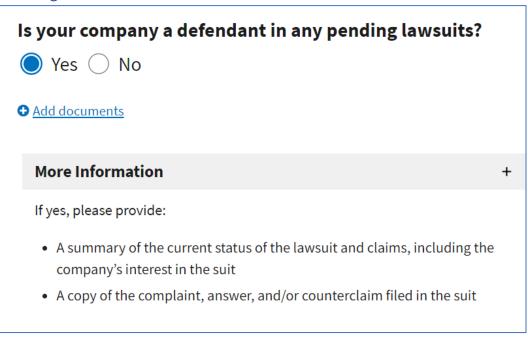




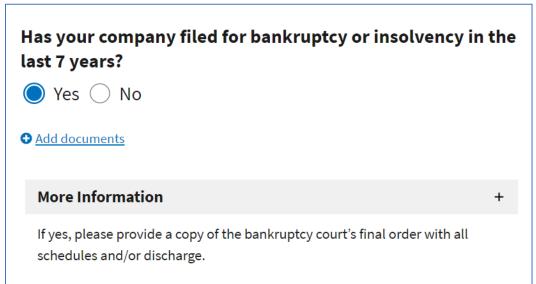


#### Character

#### **Pending Lawsuits**



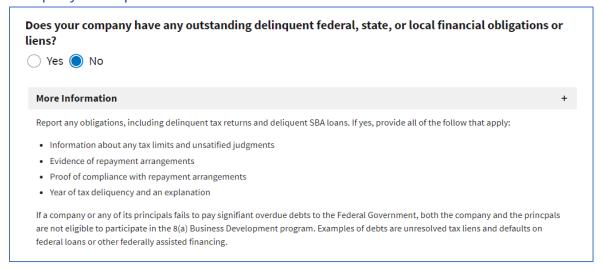
#### **Company Bankruptcy**





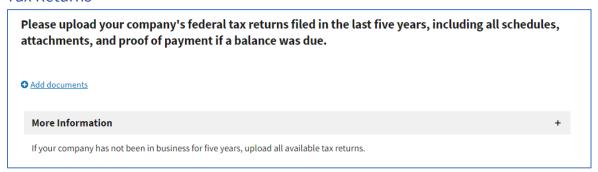


#### Company Delinquent Debt

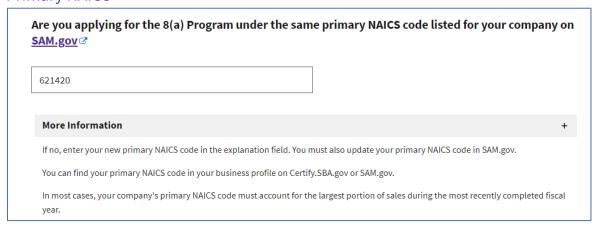


# **Potential for Success**

#### Tax Returns



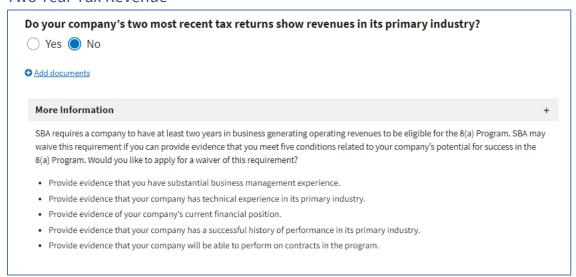
#### **Primary NAICS**







#### Two Year Tax Revenue



#### **Financial Statements**

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

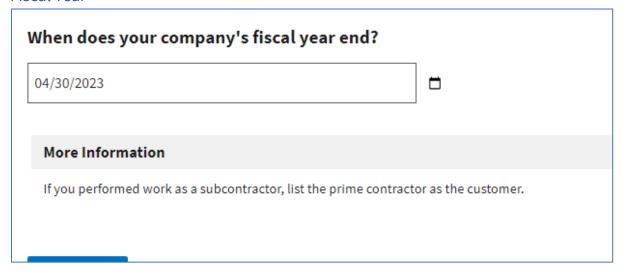
#### Add documents

**More Information**: Financial statements must include a balance sheet and a profit & loss Statement, be prepared in accordance with generally accepted accounting principles, and be no more than 180 days old when submitted. Ensure that equity/retained earnings roll forward correctly and that the distributions reported on the balance sheet are supported by company tax returns. Previous year-end financial statements are acceptable from January 1 through June 30 of each year. Starting July 1 of each year, interim or year-to-date financial statements will be required.





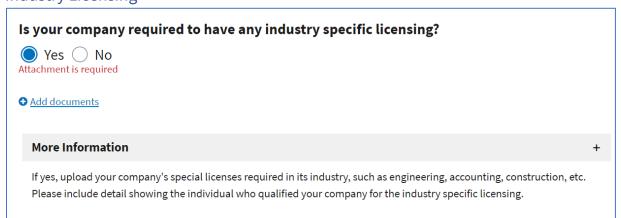
#### Fiscal Year



#### **Contracts**



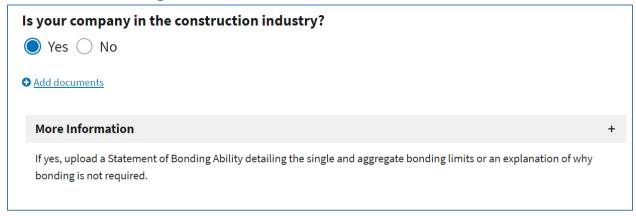
#### **Industry Licensing**





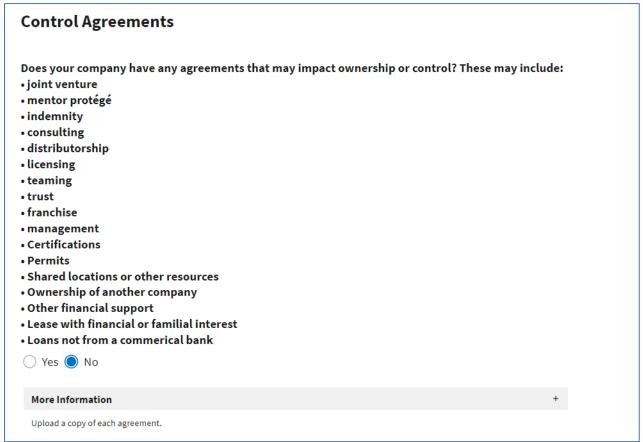


#### **Construction Bonding**



#### Control

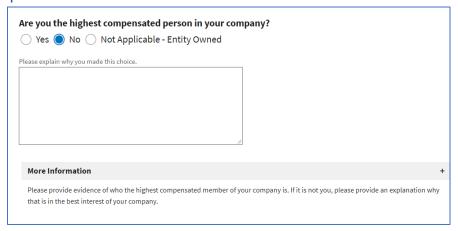
#### **Control Agreements**





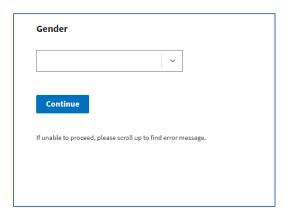


# **Highest Compensation**

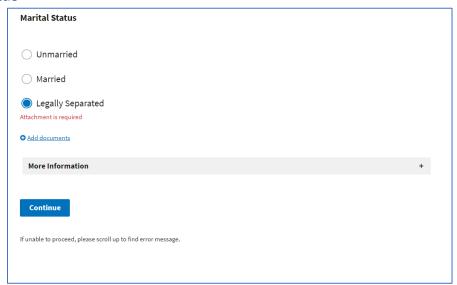


# **Disadvantaged Applicant**

#### Gender



#### **Marital Status**



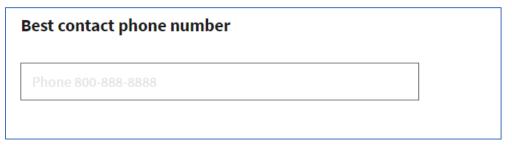




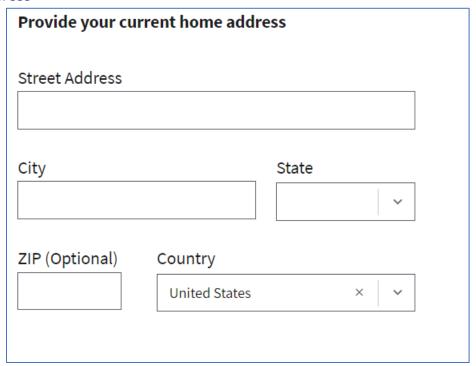
# **Social Security Number**



#### **Phone Number**



#### **Home Address**



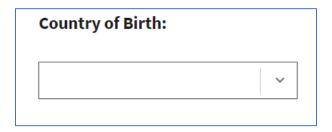




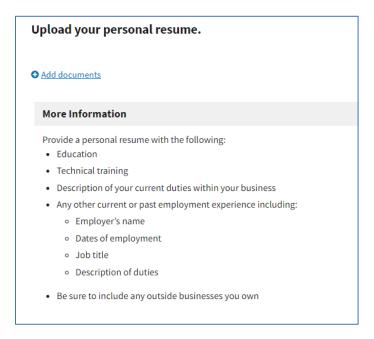
#### Date of Birth



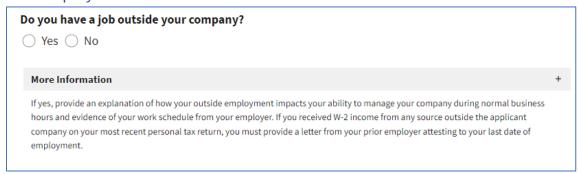
#### **Country of Birth**



#### Resume



#### **Outside Employment**



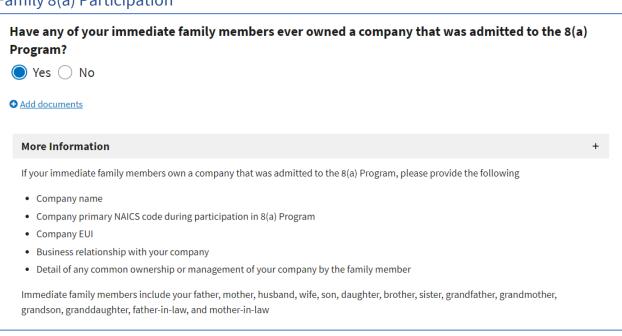




# Ownership or Management of Other Company

More Information +  If yes, provide the following:  Proof of ownership Federal Tax Returns – 5 years Year-to-date financial statements  Management interest includes but is not limited to one or more officers, directors, managing members, or partners who control the board of directors and/or management of one company also control the board of directors and/or management of another company.	you have ownership or management interest in any other company?  Yes No	
<ul> <li>Proof of ownership</li> <li>Federal Tax Returns – 5 years</li> <li>Year-to-date financial statements</li> </ul> Management interest includes but is not limited to one or more officers, directors, managing members, or partners who control the board	More Information	+
<ul> <li>Federal Tax Returns – 5 years</li> <li>Year-to-date financial statements</li> <li>Management interest includes but is not limited to one or more officers, directors, managing members, or partners who control the board</li> </ul>	If yes, provide the following:	
Year-to-date financial statements  Management interest includes but is not limited to one or more officers, directors, managing members, or partners who control the board	Proof of ownership	
Management interest includes but is not limited to one or more officers, directors, managing members, or partners who control the board	Federal Tax Returns – 5 years	
	Year-to-date financial statements	
		e board

#### Family 8(a) Participation



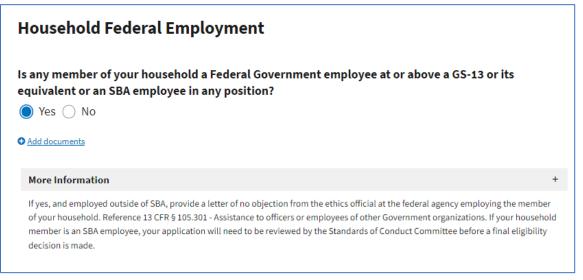




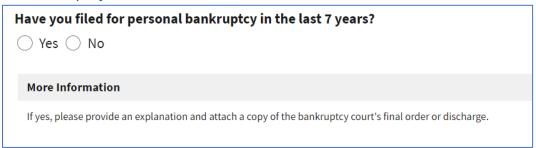
#### **DVD Federal Employment**



#### Household Federal Employment



#### Personal Bankruptcy







# Pending Civil Lawsuit

Are you a party to a pending civil lawsuit?  Yes No	
More Information	
If yes, please provide the following details about the lawsuit:  • Your interest in the suit  • Summary of the claims  • Current status of the suit	

# **Delinquent Obligations**

Are v	you de	linguent	in p	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
- Yes No Please answer this question

#### **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

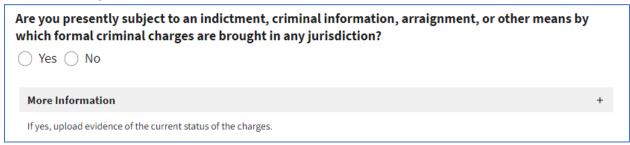




#### **Other Names**



#### **Current Charges**



#### **Recent Arrest**







#### **Prior Convictions**

For any criminal offense, other than minor motor vehicle violations, 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 judgment)



**More Information** 

If yes, provide details including dates, locations, fines, sentences, misdemeanor or felony, dates of parole/probation, unpaid fines or penalties, name(s) under which charged, and any other pertinent information. Include expunged records.

#### Social Disadvantage

#### Social 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:

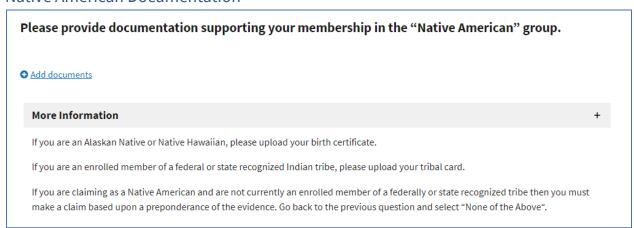
- Black Americans
- Hispanic Americans (South America, Central America, Mexico, Cuba, the Dominican Republic, Puerto Rico, Spain, and Portugal)
- Native Americans (Alaskan Natives, Native Hawaiian, enrolled member of federally or state recognized Indian Tribe)
- Asian Pacific Americans (Burma, Thailand, 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. Naurul
- 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).

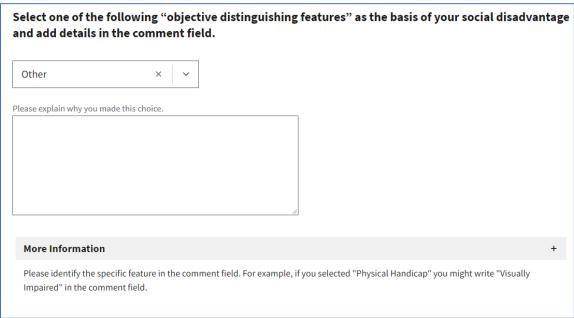




#### **Native American Documentation**



#### Other Basis of Disadvantage







#### Social Disadvantage Narrative

#### **Social Narrative**

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

#### Add documents

#### **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.
- Your disadvantage must be rooted in treatment you received in American society (not another country) and must be chronic and substantial.
- The disadvantage must have negatively impacted your entry or advancement in the business world.
- Experiences should be related to education, employment and business history (including current or previously owned companies).
  - 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.
  - 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; retaliatory or discriminatory behavior by
    an employer; and social patterns or pressures which have channeled the individual into nonprofessional or non-business fields.
  - 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.

#### **Distributions**

# 





#### **Transferred Assets**

# Transfer Assets Have you transferred any assets to any immediate family member for less than fair market value in the last two years? Yes No More Information + 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 § 124.3

#### Tax Returns

#### **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 IRS Tax

  Account Transcript)

#### Add documents

#### 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.