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Update Your Info

Is your firm's information current in SAM.gov?

Yes

No

More Information

The SBA gets your firm's information from the System for Award Management website (SAM.gov), so you must keep your firm's information in [SAM.gov](#) up to date.

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Explain Any Changes

Changes to your firm's circumstances could disqualify your firm from participating in the 8(a) program.

Have there been changes to the following in the past program year or since your firm was certified as an 8(a) Participant?

Please select any changes not previously reported to SBA:

- Firm ownership
- Management (This includes changes in any officers, directors, or daily managers — and whether the person claiming disadvantage took a job outside your firm.)
- Business structure
- Primary NAICS code designation (SBA must approve any change to primary NAICS code.)
- Articles of Incorporation
- Partnership Agreement
- Bylaws
- Operating Agreement
- Stock issues
- Other things have changed.
- None of the above have changed.**

[+ Add documents](#)

In the past program year or since your firm was certified as an 8(a) Participant, has there been conduct by your firm, or any of its principals, indicating a lack of business integrity or good character, which has resulted in any of the following?

Please check anything not previously reported to SBA:

- An arrest
- Criminal indictment
- A guilty plea or criminal conviction
- A judgment or settlement in a civil lawsuit
- Other consequences from lack of business integrity or good character
- None of the above have occurred.**

[+ Add documents](#)

In the past program year or since your firm was certified as an 8(a) Participant, are/have there been pending adverse actions that may affect your firm's business operations?

Please check all such actions not previously reported to SBA:

- Lawsuits
- Delinquent taxes
- Bankruptcy filings
- Creditor problems
- Contract disputes
- Other adverse actions
- None of the above have occurred.**

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Entity Ownership

Is your firm entity owned?

An **entity-owned firm** is a firm that is owned by an American Indian Tribe, an Alaska Native Corporation, a Community Development Corporation, or a Native Hawaiian Organization.

Yes

No

More Information

If yes, please use the [SBA Form Benefit Report template](#) to describe how your entity-owned firm has helped the Tribal or native members or the Tribal, native or other community by participating in the 8(a) program. Upload the Benefit Report as a PDF. Reference: [13 C.F.R. § 124.604](#)

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Explain Any Changes



Entity Ownership



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Tax Returns

Please upload your firm's tax returns filed with the IRS for the last 3 years.

Include all forms, schedules, and attachments as PDFs.

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Financials

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Financials

Upload your firm's year-end balance sheet and income statements (profit and loss statements) for the last 3 fiscal years.

See details below for the type of statement to upload as a PDF based on your revenue.

[+ Add documents](#)

More Information

Upload annual financial statements based on your firm's revenue:

- Firms with over \$10 million in revenue must submit audited annual financial statements prepared by a licensed CPA within 120 days of the end of the fiscal year.
- Firms with \$2-10 million in revenue may submit annual financial statements prepared and signed by a licensed CPA within 90 days of the end of the fiscal year.
- Firms with less than \$2 million in revenue may submit in-house annual statements signed and dated by a CPA or an authorized officer, partner, limited liability member, or sole proprietor of the firm within 90 days of the end of the fiscal year.

If your firm is entity owned (owned by a Tribe, ANC, NHO or CDC), please upload either:

- Your fiscal year-end balance sheets and income statements showing a breakout of 8(a) and non-8(a) revenue, or
- Consolidated financial statements prepared by your parent entity that include schedules for your firm.

Reference: [13 C.F.R. § 124.602](#)

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Revenue

Review

Revenue

Enter all revenue earned in your last fiscal year per your firm's financial statements, including revenue earned through joint ventures.

Revenue from 8(a) sales

\$

Revenue from non-8(a) sales

\$

When did your fiscal year end?

More Information

Examples of non-8(a) work include:

- Non-government/commercial contracts and subcontracts
- Government work outside of an 8(a) award
- Multiple award schedule contracts not offered through the 8(a) program

Examples of 8(a) work include:

- 8(a) prime contracts for federal government (not subcontracts)
- 8(a) task orders on multiple award schedules
- 8(a) contracts awarded to 8(a) joint ventures

Reference: [13 C.F.R. § 124.509\(c\)\(i\)](#)

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Outside assistance

Outside assistance includes any agents, representatives, attorneys, accountants, consultants, or other individuals focused on helping your firm get contracts.

First tell us about the past 6 months:

Did your firm hire outside assistance to help you get federal contracts?

- Yes
- No

More Information

If you use outside assistance to help you get a federal contract, you must submit [SBA Form 1790](#) every 6 months. Reference: [13 CFR § 124.4](#)

Next tell us about first 6 months of the program year:

Did your firm hire outside assistance to help you get federal contracts?

- Yes
- No

More Information

If you use outside assistance to help you get a federal contract, you must submit [SBA Form 1790](#) every 6 months. Reference: [13 CFR § 124.4](#)

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Outside assistance ✓

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Compensation

Are you the highest paid employee at your firm?

In general, to maintain your firm's 8(a) eligibility, the firm owner claiming disadvantage must receive the highest pay. This rule does not apply to contractors or other people you hire to perform specialty services.

- My firm is entity owned, so this question doesn't apply to me.
- Yes
- No

More Information

If you are not the highest paid employee, please upload an explanation of why this is best for your firm as a PDF. This explanation should be on your firm's letterhead and signed by you since your firm's eligibility is based on you.

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Control

- Outside assistance ✓
- Compensation ✓

Affiliates

- Affiliates**
- Changes to Affiliates

Review

Affiliates

Does your firm have known affiliates?

If your firm shares management, ownership, or control with another firm, you may have an affiliate. See details below.

- Yes
- No

More Information

Affiliation most often comes from common ownership between firms, but it can exist in other ways. Affiliation and size are closely related.

Affiliation can be based on:

- Common management or ownership
- Stock ownership
- Mergers and acquisitions
- "Identity of interest," which includes family ties between firms, shared financial interests, similar investments, and financial dependence between firms
- Franchise and license agreements
- 8(a) joint ventures, if firms continue creating joint ventures and working together over a long period
- Other factors

With Mentor/Protégé Agreements (MPAs), the SBA does not find affiliation between an 8(a) firm and its mentor only because the mentor helps the protégé per the MPA. But the firms may be affiliated for other reasons. (See list above.)

SBA does not consider entity-owned firms affiliates of the entities that own them — or affiliates of their sibling companies. But entity-owned firms may be affiliated with outside firms. (See list above.)

[Learn how the SBA decides affiliation](#). Also see [SBA's Size Regulations](#) and [13 CFR § 121.103](#).

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Outside assistance ✓

Compensation ✓

Affiliates

Affiliates ✓

Changes to Affiliates

Review

Changes to Affiliates

In the past fiscal year, has your firm added or removed affiliates?

If your firm is entity-owned, have your sister subsidiaries changed?

Yes

No

More Information

If yes, please upload a current list of your firm's known affiliates as a PDF.

[Learn how the SBA decides affiliation](#). Also see [SBA's Size Regulations](#) and [13 CFR § 121.103](#).

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Ownership

Payments and Excessive Withdrawals

Review

Payments and Excessive Withdrawals

List all salaries, bonuses, advances, loans, distributions, or dividends paid in the past fiscal year to:

- Your firm's owners, officers, or directors
- Outside firms that your firm's officers or directors own at least 10% of
- Outside firms with an officer, partner, or director who is also an owner, officer, or director of your firm

Payments, Distributions, and Compensation

Name	Title	Equity Interest	Reasons for Payment	Total Payments	Actions
No items added yet					

Add item

Please explain why you made this choice.

In the past fiscal year, has your firm made outstanding loans to any of the following?

- Your firm's owners, officers, or directors
- Shareholders who own more than 10% of your firm's stock
- Outside firms that your firm's officers or directors own at least 10% of
- Outside firms with an officer, partner, or director who is also an owner, officer, or director of your firm

Yes

No

More Information

If yes, please upload all promissory notes or letters describing the loan as PDFs.

In the past fiscal year, has your firm made payments to any of the following people — payments that in total exceed the excessive withdrawal thresholds?

- Your firm's owners, officers, or directors
- Outside firms that your firm's officers or directors own at least 10% of
- Outside firms with an officer, partner, or director who is also an owner, officer, or director of your firm

Yes

No

More Information

During any fiscal year of the firm, withdrawals are excessive if they total more than:

- \$250,000 for firms with sales up to \$1,000,000
- \$300,000 for firms with sales between \$1,000,000 and \$2,000,000
- \$400,000 for firms with sales exceeding \$2,000,000

The term "withdrawal" includes, but is not limited to:

- Cash dividends
- Distributions that exceed amounts needed to pay S Corporation, LLC or partnership taxes
- Cash and property withdrawals
- Payments to immediate family members not employed by your firm
- Bonuses to officers
- Investments on behalf of an owner

Although officers' salaries are generally not considered withdrawals for purposes of this definition, SBA will count those salaries as withdrawals where SBA believes that a firm is attempting to avoid the excessive withdrawal limitations through the payment of officers' salaries. SBA will look at the totality of the circumstances in determining whether to include any specific amount as a withdrawal.

Reference: [13 C.F.R § 124.112\(d\)](#)

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8(a) Mentor-Protégé Program

Is your firm in the 8(a) Mentor-Protégé program?

Yes

No

More Information

For each of your 8(a) MPP mentors, you must complete and upload a [Mentor-Protégé Worksheet](#).

The SBA has two different mentor-protégé programs (MPPs):

- The 8(a) Mentor/Protégé Program
- The All-Small Mentor/Protégé Program

The [8\(a\) MPP](#) has served only 8(a) firms since 1998. 8(a) MPP mentors help guide 8(a) protégé firms in competing for and performing on non-8(a) contracts so 8(a) protégé firms build their capabilities. Reference: [13 C.F.R. § 124.520](#)

The [All-Small MPP](#) has served both 8(a) firms and non-8(a) firms since late 2016. Reference: [13 C.F.R. § 125.9](#)

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Upload Business Plan

Please upload your firm's current business plan as a PDF.

[+ Add documents](#)

More Information

You may use the [SBA 8\(a\) Business Plan](#) template, though you're not required to use it.

Have you changed or updated your business plan?

- Yes
- No

More Information

You should update your firm's business plan each year to show how you will increase your non-8(a) revenue as you progress through the 8(a) program.

In program years 5 to 9, the transitional stage of the 8(a) program, you're required to update your business plan each year to show your strategy for getting a diverse mix of contracts that includes non-8(a) work. The 8(a) program regulation refers to this part of your business plan as your "transition management strategy." Reference: [13 C.F.R. § 124.403\(c\)](#)

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Determine Stage of the Program

When did your firm enter the 8(a) Program?

mm/dd/yyyy

Is your firm in the Transitional Stage (Program Years 5 through 9)?

Yes

No

More Information

Program years 5 to 9 are the transitional stage of the 8(a) program. During this stage, your firm should focus on increasing revenue from non-8(a) contracts to prepare for graduation from the program.

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Business Activity Targets

While your firm is in the transitional stage of the 8(a) program (years 5 through 9), how do you plan to meet the required non-8(a) business activity targets?

1000 characters max.

More Information

Each year during the transitional stage of the 8(a) program, you must update your transition management strategy in your business plan to show how your firm plans to meet the required non-8(a) business activity targets.

The non-8(a) business activity targets below show the required minimum non-8(a) revenue as a percentage of your firm's total revenue.

Non-8(a) Business Activity Targets

- Program Year 5: 15%
- Program Year 6: 25%
- Program Year 7: 35%
- Program Year 8: 45%
- Program Year 9: 55%

References: [13 C.F.R. § 124.509](#) and [13 C.F.R. § 124.403\(c\)\(1\)](#).

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Steps for Growth

What steps do you plan to take to ensure business growth and profitable operations after you graduate from the 8(a) program?

1000 characters max.

More Information

Your plan for continuing growth and profitable operations should be part of your transition management strategy, which should be included in your business plan and updated each year during the transitional stage of the 8(a) program. Reference: [13 C.F.R. § 124.403\(c\)\(2\)](#).

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Marketing Capability Statement

Please upload your most recent marketing capability statement as a PDF.

[+ Add documents](#)

More Information

A marketing capability statement is typically one page and it may include:

- A description of the firm's products and/or services and past performance (In the description, it's important to use keywords common to your business/industry.)
- Primary NAICS code
- Secondary NAICS code
- DUNS number
- CAGE code
- Bonding level
- Certifications

In the past program year, have you changed or updated this marketing capability statement?

- Yes
- No

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Your 8(a) Joint Ventures

Does your firm have any active 8(a) Joint Ventures?

All 8(a) joint ventures must be approved by your Business Opportunity Specialist.

Yes

No

More Information

Your SBA district office approves JV agreements only when an 8(a) firm can't perform the contract by itself, and the JV agreement is fair and benefits the 8(a) firm substantially. Reference: [13 C.F.R. § 124.513](#)

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Joint Venture Information

Please list all your active 8(a) joint ventures.

JOINT VENTURE #1 [REMOVE](#)

Joint Venture Name

Joint Venture DUNS Number

Joint Venture Partners

Is this joint venture with your official 8(a) mentor?

- Yes
- No
- I don't have an 8(a) mentor

[+ Add Joint Venture](#)

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Contracts

Has your firm performed work on any 8(a) contracts during the past program year?

- Yes
- No

More Information

If yes, then please download and fill out the [8\(a\) Contract Worksheet](#) for each contract, then upload it as a PDF. If a contract is ongoing, enter your expected percentage for performance of work in the 8(a) Contract Worksheet.

Limitations on subcontracting apply to 8(a) prime contractors. Your firm or 8(a) joint venture must perform a certain percentage of the work on a contract based on the industry:

- 50% for manufacturing
- 50% for services
- 25% for general construction
- 15% for specialty construction

Similarly situated entities are 8(a) subcontractors you work with on a contract. The work they do can be counted towards your firm's percentage of work for a contract. A similarly situated entity must be considered small for the contract's NAICS code.

For example, on a services contract, your firm may subcontract only 50% of the work to a non-8(a) firm. Your firm or a similarly situated entity subcontractor must perform at least 50% of the work.

For joint venture contracts, your firm or a similarly situated entity must perform at least 40% of the total work performed by the joint venture.

For example, your joint venture got a construction contract with the Parks Department. Your firm performs 20% of the work, your joint venture partner performs 50%, and a similarly situated 8(a) subcontractor performs 30%. You are in compliance because similarly situated 8(a) firms performed over 40% of the work.

Per the **3/2 Rule**, an 8(a) joint venture may not get more than 3 contracts in 2 years. The 2-year period starts the day of the first award. But the same firms can form additional joint ventures, and each joint venture may get up to 3 contracts in 2 years. Until the first award, each JV may continue to bid on contracts.

References: [13 C.F.R. § 125.1](#), [13 C.F.R. § 125.8](#), [13 C.F.R. § 125.6](#), and [13 C.F.R. § 121.103\(h\)](#)

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Contract Forecast

Review

Contract Forecast

Each program year, you must forecast how much revenue your firm needs from 8(a) and non-8(a) contracts and subcontracts for the next program year.

First forecast your 8(a) contracts for the next program year:

Expected revenue from 8(a) **sole source** contracts

\$

Expected revenue from 8(a) **competitive** contracts

\$

Now forecast your non-8(a) contracts for the next program year:

Expected revenue from non-8(a) **sole source** contracts

\$

Expected revenue from non-8(a) **competitive** contracts

\$

More Information

The annual review of your business plan includes an estimate of how much revenue your firm needs from contracts. Reference: [13 C.F.R. § 124.403\(b\)](#).

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