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Individual Contributors

Your contributors

Please complete your firm owner questionnaire and invite your contributors to complete theirs. Each person you invite to contribute will receive an email with instructions for creating their profile and submitting their information.

ATTENTION! - Your Individual Contributors will have only **24 hours** from the time you send your invitation to access the link they will receive in an email sent to the address you enter. Thereafter, the applicant must submit a help ticket the [Certify Help Desk](#).

Entity-owned firms: You are not required to answer all of these sections or questions. Please follow the supplemental instructions for entity-owned firms.

blank2 Steve - firm owner (disadvantaged individual)

As the firm owner applying for the 8(a) program, you are claiming economic disadvantage and must submit this section about your personal financial information.

Status: **NOT STARTED**

[Go to questionnaire](#)

Other disadvantaged owners (disadvantaged individual)

Your firm must be at least 51% owned by one or more economically disadvantaged individuals to qualify for the 8(a) program. If you do not own 51% or more of the firm, send the other owner(s) who are claiming economic disadvantage an invitation to submit this section.

Note: An individual can only claim disadvantage for 8(a) certification once in their lifetime. If you own 51% or more of the firm, the other owner(s) do not need to submit this section.

[Invite other disadvantaged owners](#)

Spouses

The spouse(s) of every owner claiming economic disadvantage – currently married or legally separated – must submit this section.

If all disadvantaged owners are unmarried, skip this question.

[Invite spouses](#)

People involved with your firm

Each of the following people involved with your firm must complete this section. Note: Spouses of disadvantaged owners only need to complete the spouse section.

- Everyone who owns at least 10% of your firm
- Officers
- Directors
- Board members
- Managers
- Partners

[Invite people involved with your firm](#)

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Marital Status

- Unmarried
- Married
- Legally Separated

More Information

If you are legally separated upload evidence such as court documents.

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Social Security Number

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Best contact phone number

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Basis of Disadvantage

Basis of Disadvantage.

Native American Documentation

Other Basis of Disadvantage

Social Narrative

Economic Disadvantage

Current Home Address

Provide your current home address

Street Address

City

State

ZIP

Country

Dates of Residency

More Information

Provide the date you started living at this location.

Continue

If unable to proceed, please scroll up to find error message.

General Information

Gender ✓

Marital Status ✓

Social Security Number ✓

Contact Information ✓

Current Home Address ✓

Length of residency

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Length of residency

Have you lived at your present address more than 10 years?

Yes

No

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General Information

- Gender ✓
- Marital Status ✓
- Social Security Number ✓
- Contact Information ✓
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- Length of residency ✓
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- Basis of Disadvantage.
- Native American Documentation
- Other Basis of Disadvantage
- Social Narrative

Economic Disadvantage

- Transfer Assets
- Tax Returns
- Financial Data
- Cash On Hand

Previous Home Address

Provide your most recent previous home address

Street Address

City State

ZIP

Country

Dates of Residency

FROM:

TO:

More Information

Provide the dates you started and ended living at this location.

[Continue](#)

If unable to proceed, please scroll up to find error message.

General Information

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Contact Information ✓

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Length of residency ✓

Previous Home Address ✓

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Date and Place of Birth

Date of Birth

Place of Birth

Country of Birth

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General Information

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Marital Status ✓

Social Security Number ✓

Contact Information ✓

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Length of residency ✓

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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 CFR § 124.101

If you were born outside of the United States 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)

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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



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Criminal History Documentation

Basis of Disadvantage

Upload Resume

Upload your personal resume.

[+ Add documents](#)

More Information

Provide a personal resume with the following:

- Education
- Technical training
- Description of your current duties within the Applicant firm
- Any other current or past employment experience including:
 - Employer's name
 - Dates of employment
 - Job title
 - Description of duties
- Be sure to include any outside businesses you own

Continue

If unable to proceed, please scroll up to find error message.

General Information



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Resume



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Applicant Firm Ownership

What percentage of the Applicant Firm do you own?

 %

List all positions you hold in the Applicant Firm.

Continue

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General Information



Gender



Marital Status



Social Security Number



Contact Information



Current Home Address



Length of residency



Previous Home Address



Date and Place of Birth



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Resume



Upload Resume



Ownership and Control

Applicant Firm Ownership



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Bank Account Access

Are you authorized to access or make withdrawals from the Applicant Firm's bank account?

Yes

No

More Information

If yes, please describe any limitations on the firm's bank account including signatures required on certain dollar amounts.

Continue

If unable to proceed, please scroll up to find error message.

General Information



Gender



Marital Status



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Contact Information



Current Home Address



Length of residency



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Resume



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Ownership and Control

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Do you have another job outside the Applicant Firm?

Yes

No

More Information

If yes, please upload a document with information about the job:

- Job title
- Your primary role and responsibilities
- Average number of hours worked per week
- Normal weekly work schedule
- Explanation of how this job does not conflict with the day-to-day management of the firm

[Continue](#)

If unable to proceed, please scroll up to find error message.

- General Information ✓
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 - Prior 8a Involvement
 - Federal Employment
 - Household Federal Employment

-
- Character
 - Financial
 - Criminal History

Business Affiliations

Do you own or work for any other firm that has a relationship with the Applicant Firm?

- Yes
- No

More Information

Ownership in other firms does not include any publicly traded stocks, bonds, or mutual funds. Answer yes if you work for a firm with ownership interest, financial investments, loans, leases or shared office space, equipment, or personnel. If yes, please upload a detailed explanation of the firm and relationship including:

- Firm name
- Firm NAICS code
- Your ownership or interest
- Your title
- Your primary role or function
- Nature of the relationship with the Applicant Firm
- Financial Details (loan agreements, other agreements)
- Business Revenues
- Any additional relevant information

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- Native American Documentation
- Other Basis of Disadvantage
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- Signature

Do any of your immediate family members own a firm with a contractual relationship with the Applicant Firm?

- Yes
- No

More Information

If yes, please provide the following information about the immediate family member and the other firm:

- Immediate family member name
- Relationship to you
- Firm name
- Firm NAICS Code
- Family member title
- Family member primary role or function
- Is the firm a current or previous participant in the 8(a) program?
- Any additional relevant information

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

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General Information



Gender



Marital Status



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Ownership and Control



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Prior 8a Involvement

Have you – or any firm you owned – ever applied for 8(a) Certification or participated in the 8(a) Program?

Yes

No

More Information

If yes, please provide the following information about the firm:

- Firm name
- DUNS number
- Ownership or interest
- NAICS code that the firm was approved under
- Any additional relevant information

Answer yes if you:

- Withdrew an application or had an application denied
- Terminated, voluntarily withdrew, or graduated early from the 8(a) program

Financial

Criminal History

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Basis of Disadvantage

Basis of Disadvantage.

Native American Documentation

Other Basis of Disadvantage

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Have you already used your one-time-only 8(a) eligibility to qualify a business for the 8(a) Program?

Yes

No

More Information

One-time-only 8(a) eligibility means any firm or individual that has already used their disadvantaged status to participate in the 8(a) Program is not eligible to participate again.

If you have already used your one-time eligibility for the 8(a) program, then your firm may not be qualified for the 8(a) program.

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Have any of your immediate family members ever owned a firm that was admitted to the 8(a) Program?

Yes

No

More Information

If yes, please provide the following information about the other firm:

- Firm name
- Owner's name and title
- Ownership or interest
- NAICS code that the firm was approved under
- Any additional relevant information including business relationships with the Applicant Firm

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

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Branch: Commit:

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Federal Employment

Are you a Federal Government employee holding a position of GS-13 or above?

Yes

No

More Information

If yes, you must submit a letter of no objection from your federal agency. The Federal Acquisition Regulation (FAR), [Subpart 3.6](#) places restrictions on Federal Government employees which may prevent the Applicant Firm from acquiring contracts or create conflicts of interest. In addition, there are limitations on SBA's ability to provide assistance to government employees. See 13 C.F.R. § 105.301.

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General Information



Gender



Marital Status



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Contact Information



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Resume



Upload Resume



Ownership and Control



Applicant Firm Ownership



Bank Account Access



Full Time Devotion



Business Affiliations



Prior SA Involvement

Household Federal Employment

Is any member of your household a Federal Government employee holding a position of GS-13 or above?

Yes

No

More Information

If yes, please provide a letter of no objection from the federal agency employing the family member. Reference: 13 C.F.R. § 105.301

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Household Federal Employment	✓
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Criminal History	
Criminal History Documentation	

Financial

Have you filed for personal bankruptcy within the past 7 years?

- Yes
- No

More Information

If yes, please provide an explanation and attach a copy of the bankruptcy court's final order or discharge.

Have you previously obtained an SBA loan?

- Yes
- No

More Information

If yes, please provide the following borrower details:

- Name of borrower
- Date approved (or estimated date)
- Current status of loan

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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

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**

- Yes
 No

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

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Upload Resume ✓

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Applicant Firm Ownership ✓

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Full Time Devotion ✓

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Prior 8a Involvement ✓

Prior 8a Involvement ✓

Federal Employment ✓

Criminal History

Have you ever gone by any other names?

Yes

No

More Information

Other names may include birth name, married name, etc.

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

Yes

No

- Character
- Financial ✓
- Criminal History**
- Criminal History Documentation

- Basis of Disadvantage
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Have you been arrested in the past six months for any criminal offense?

- Yes
- No

For any criminal offense – other than a minor vehicle violation – 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)**

- Yes
- No

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Criminal History	✓
Criminal History Documentation	

Basis of Disadvantage	
Basis of Disadvantage.	
Native American Documentation	
Other Basis of Disadvantage	
Social Narrative	

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](#)

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Upload a completed Form FD-258 Fingerprint Card.

[+ Add documents](#)

More Information

Fingerprint cards can be printed from the FBI's website.

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Prior 8a Involvement	✓
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Financial	✓
Criminal History	✓
Criminal History Documentation	✓
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Native American Documentation	
Other Basis of Disadvantage	
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Basis of Disadvantage.

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

Please select ▼

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).

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General Information ✓

Gender ✓

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Federal Employment ✓

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Character ✓

Financial ✓

Criminal History ✓

Criminal History Documentation ✓

Native American Documentation

Please provide documentation supporting your membership in the “Native American” group.

[+ Add documents](#)

More Information

If you are an Alaskan Native or Native Hawaiian, please upload your birth certificate.

If you are an enrolled member of a federal or state recognized Indian tribe, please upload your tribal card.

If you are claiming as a Native American and are not currently an enrolled member of a federally or state recognized tribe then you must make a claim based upon a preponderance of the evidence. Go back to the previous question and select “None of the Above.”

[Continue](#)

If unable to proceed, please scroll up to find error message.

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



Applicant Firm Ownership



Bank Account Access



Full Time Devotion



Business Affiliations



Prior 8a Involvement



Other Basis of Disadvantage

Select one of the following “objective distinguishing features” as the basis of your social disadvantage and add details in the comment field.

Please select



More Information

Please identify the specific feature in the comment field. For example, if you selected "Physical Handicap" you might write "Visually Impaired" in the comment field.

Continue

If unable to proceed, please scroll up to find error message.

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	✓
Applicant Firm Ownership	✓
Bank Account Access	✓
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	
Economic Disadvantage	
Transfer Assets	
Tax Returns	
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	

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 firms).
 - 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.

[Continue](#)

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 ✓

Applicant Firm Ownership ✓

Bank Account Access ✓

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. ✓

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

[Continue](#)

If unable to proceed, please scroll up to find error message.

General Information ✓

Gender ✓

Marital Status ✓

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Contact Information ✓

Current Home Address ✓

Length of residency ✓

Previous Home Address ✓

Date and Place of Birth ✓

US Citizenship ✓

Resume ✓

Upload Resume ✓

Ownership and Control ✓

Applicant Firm Ownership ✓

Bank Account Access ✓

Full Time Devotion ✓

Business Affiliations ✓

Prior 8a Involvement ✓

Prior 8a Involvement ✓

Federal Employment ✓

Tax Returns

Upload your personal Federal tax returns from the last three years including all schedules and attachments.

[+ 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.

[Continue](#)

If unable to proceed, please scroll up to find error message.

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 ✓

Applicant Firm Ownership ✓

Bank Account Access ✓

Full Time Devotion ✓

Business Affiliations ✓

Prior 8a Involvement ✓

Prior 8a Involvement ✓

Federal Employment ✓

Household Federal Employment ✓

Character ✓

Cash On Hand

As of Date:

More Information

Use the date of the information provided (i.e. the last date of the previous month). The information must be no older than 30 days old.

Cash on Hand

\$

More Information

The sum of all coins and currency that are not on deposit with a financial institution.

- 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 ✔
- Tax Returns ✔
- 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
- Assessed Taxes
- Personal Summary
- Privacy Statements

- Review

- Signature

Savings Account(s) Balance

\$

Checking Account(s) Balance

\$

More Information

Include funds held domestically and in foreign financial institutions. Include funds held in certificates of deposit and money market accounts as part of the Savings Account(s) Balance.

[Continue](#)

If unable to proceed, please scroll up to find error message.

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[Regulations.gov](#)

[BusinessUSA.gov](#)

[USA.gov](#)



Contact SBA

[Certify Help Desk](#)

- General Information ✓
- Gender ✓
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- US Citizenship ✓

- Resume ✓
- Upload Resume ✓

- Ownership and Control ✓
- Applicant Firm Ownership ✓
- Bank Account Access ✓
- Full Time Devotion ✓
- Business Affiliations ✓

- Prior 8a Involvement ✓
- Prior 8a Involvement ✓
- Federal Employment ✓
- Household Federal Employment ✓

- Character ✓
- Financial ✓
- Criminal History ✓

Other Sources Of Income

Salary

\$

More Information

Include yearly salary from applicant firm or other salaried positions.

Other Income

\$

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.

Basis of Disadvantage	✓
Basis of Disadvantage.	✓
Native American Documentation	
Other Basis of Disadvantage	✓
Social Narrative	✓
<hr/>	
Economic Disadvantage	
Transfer Assets	✓
Tax Returns	✓
Financial Data	
Cash On Hand	✓
Other Sources Of Income	
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Retirement Accounts	
Life Insurance	
Stocks & Bonds	
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Real Estate - Other	
Personal Property	
Notes Payable and Other Liabilities	
Assessed Taxes	
Personal Summary	
Privacy Statements	
<hr/>	
Review	
<hr/>	
Signature	

Your Equity in the Applicant Firm

\$

More Information

This is the value of the individual's equity interest in the applicant firm. The applicant firm is the firm seeking certification with SBA. Use the applicant firm's current balance sheet to determine the value of the equity interest. The value of equity interest equals the applicant firm's net worth multiplied by the individual's ownership percentage.

Your Equity in Other Firms

\$

More Information

This is the value of the individual's equity interest in companies other than the applicant firm. 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 the applicant firm.

[Continue](#)

If unable to proceed, please scroll up to find error message.

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[USA.gov](#)



Contact SBA

[Certify Help Desk](#)

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



Applicant Firm Ownership



Bank Account Access



Full Time Devotion



Business Affiliations



Notes Receivable

Do you have any notes receivable from others?

Yes

No

More Information

Include shareholder/officer/member/partner loans from individual to applicant firm, as well as any loans given to other individuals or companies.

[Continue](#)

If unable to proceed, please scroll up to find error message.

General Information	✓
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Criminal History Documentation	✓
Basis of Disadvantage	✓
Basis of Disadvantage.	✓
Native American Documentation	
Other Basis of Disadvantage	✓
Social Narrative	✓
Economic Disadvantage	

Retirement Accounts

Do you have a Roth IRA?

- Yes
 No

More Information

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 net worth if the statement indicates that the funds are not available until retirement age without a significant penalty.

Do you have any other retirement accounts?

- Yes
 No

More Information

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 net worth if the statement indicates that the funds are not available until retirement age without a significant penalty.

[Continue](#)

If unable to proceed, please scroll up to find error message.

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Prior 8a Involvement	✓
Federal Employment	✓
Household Federal Employment	✓
Character	✓

Life Insurance

Do you have a life insurance policy that has a cash surrender value?

- Yes
- No

More Information

The cash surrender value is the total received if a life insurance policy is cancelled. This does not apply to term life insurance policies.

Do you have any loans against a life insurance policy?

- Yes
- No

[Continue](#)

If unable to proceed, please scroll up to find error message.

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



Applicant Firm Ownership



Bank Account Access



Full Time Devotion



Business Affiliations



Stocks & Bonds

Do you have any stocks, bonds or mutual funds?

Yes

No

More Information

Total value equals the Market Value Quotation multiplied by the number of shares.

[Continue](#)

If unable to proceed, please scroll up to find error message.

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Length of residency	✓
Previous Home Address	✓
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US Citizenship	✓
Resume	✓
Upload Resume	✓

Real Estate - Primary Residence

Do you own your primary residence?

- Yes
- No

Continue

If unable to proceed, please scroll up to find error message.

- 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 ✓

Real Estate - Other

Do you own any additional real estate?

- Yes
- No

Continue

If unable to proceed, please scroll up to find error message.

General Information	✓
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Resume	✓
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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	✓

Personal Property

Do you own any vehicles?

- Yes
 No

More Information

If the vehicle is jointly owned or the loan on the vehicle is a joint debt, include only the individual's share of the vehicle value and loan balance. You can find the current value of vehicles in the Kelley Blue Book.

Do you own any other personal property or assets?

- Yes
 No

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](#)

If unable to proceed, please scroll up to find error message.

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 ✓

Applicant Firm Ownership ✓

Bank Account Access ✓

Full Time Devotion ✓

Business Affiliations ✓

Prior 8a Involvement ✓

Prior 8a Involvement ✓

Notes Payable and Other Liabilities

Do you have any notes payable or other liabilities?

Yes

No

More Information

List any notes payable including credit cards and personal lines of credit. Include loans owed to the applicant firm, 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

If unable to proceed, please scroll up to find error message.

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



Applicant Firm Ownership



Bank Account Access



Full Time Devotion



Business Affiliations



Prior 8a Involvement



Assessed Taxes

Do you have any Assessed Taxes that were unpaid?

Yes

No

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](#)

If unable to proceed, please scroll up to find error message.