

SBA PPP APPLICATION INSTRUCTIONS
APPLICANTS WITH DIFFERENT LENDER FROM FIRST LOAN AND
APPLYING FOR FIRST PPP LOAN

DOCUMENTATION COLLECTION

Gather the following documentation, complete the applicable forms, and scan the documents in a format (pdf preferred) that can be uploaded to the application portal. Please provide all information from the same calendar year of either 2019 or 2020.

LIST OF REQUIRED DOCUMENTATION

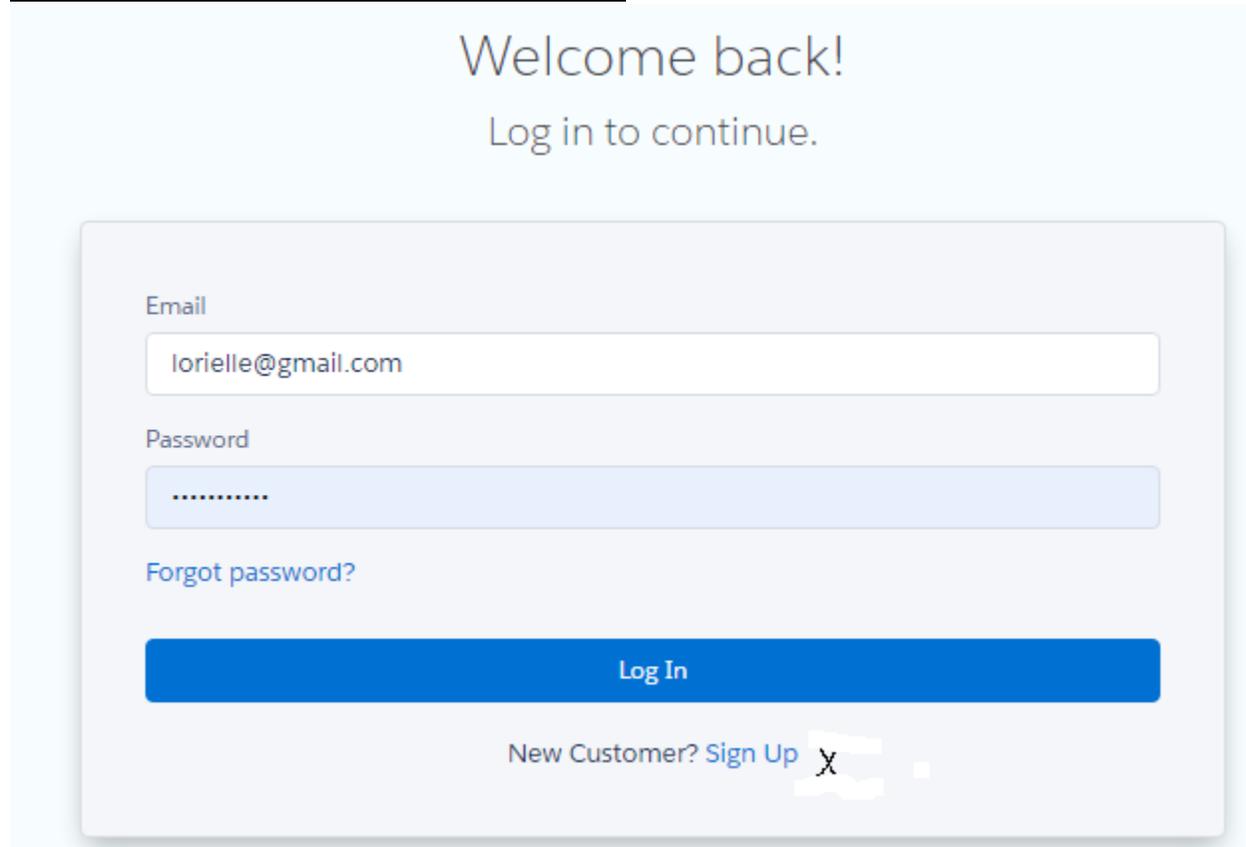
1. COMPLETED APPLICATION
FIRST PPP LOAN: SBA FORM 2483 PPP APPLICATION FORM (REVISED 1/8/2021)
2. ARTICLES OF INCORPORATION/ORGANIZATION (CORPORATIONS) or BYLAWS/OPERATING AGREEMENT (LLCS) or BUSINESS LICENSE (SOLE PROPRIETORSHIPS)
3. COMPLETED PAYROLL PROTECTION PROGRAM APPLICATION FORM
4. 2019 OR 2020 IRS QUARTERLY 941 PAYROLL TAX REPORTS
5. 2019 OR 2020 PAYROLL REPORT (INCLUDING PAYROLL TAXES AND NUMBER OF EMPLOYEES) FOR CALENDAR YEAR 2019
6. **OPTIONAL:** DOCUMENTATION SHOWING TOTAL OF ALL HEALTH INSURANCE PREMIUMS PAID BY THE COMPANY OWNER(S) UNDER A GROUP HEALTH PLAN. INCLUDE ALL EMPLOYEES AND THE COMPANY OWNERS
7. **OPTIONAL:** DOCUMENT THE SUM OF ALL RETIREMENT PLAN FUNDING THAT WAS PAID BY THE COMPANY OWNER(S) (DO NOT INCLUDE FUNDING THAT CAME FROM EMPLOYEES OUT OF THEIR PAYCHECK DEFERRALS).
8. COPY OF FRONT AND BACK OF DRIVERS LICENSE OR PASSPORT FOR ALL AUTHORIZED SIGNERS OF BUSINESS
9. SCHEDULE OF ANY SUPPLEMENTARY FACTS OR ANSWERS AS REQUESTED IN THE APPLICATION

MEMBER PORTAL INSTRUCTIONS

Member will apply for the PPP product through the customer portal.

<https://mbfs.force.com/customers>

Member will sign in to create an account



>Welcome back!
Log in to continue.

Email

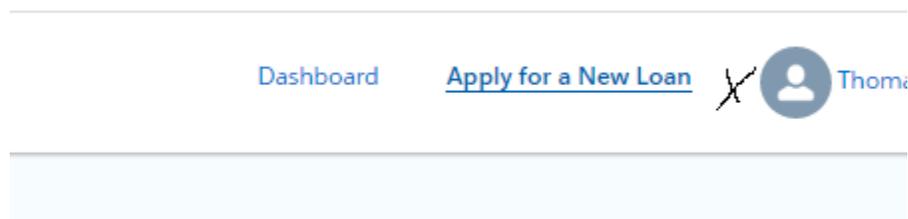
Password

[Forgot password?](#)

[Log In](#)

[New Customer? Sign Up](#)

Borrower will apply for a New Loan



[Dashboard](#) [Apply for a New Loan](#)  Thom

Apply for the SBA Loan

SBA	Apply
SBA Guaranteed lending product for operating entities.	

Complete the application



Let's determine your eligibility

Help us determine the terms of the loan that best meet your needs

Loan Amount

USD 15,000.00

Loan Purpose

PPP

Are you affiliated with a Credit Union?

Yes

What Credit Union are you affiliated with?

Credit Union

[Next](#)

Complete business information

Tell us about your business

We'll use this information to verify your business and confirm your eligibility

Legal Business Name

Annual Revenue

Tax Identification Number (TIN)

 Why do we need this?

Legal Entity Type

Where is your business located?

Billing Address

City

State

ZIP

Complete Contact Information

Role

Co-Owner



Social Security Number (SSN)

.....



Why do we need this?

Contact Information

Residential Address

lorielle@gmail.com

City

Philadelphia

State

PA



ZIP

19115

Mailing Address Same as Residential



Legal Information

Skip Borrowers and Guarantors section



Borrowers & Guarantors

Please add, excluding yourself, any additional guarantors and borrowers for the loan.

[Add a Borrower or Guarantor](#)

[Skip](#)

[Save and come back later](#)

Review and submit application



Does everything look right?

Let's double check what you've entered. Once you submit this, we'll process your application and the Credit Union will be in touch within 1-2 days.

Request

[Edit](#)

Loan Amount

USD 15,000.00

Loan Purpose

PPP

OA Is Affiliated With Credit Union

Yes

OA Credit Union

CU of Atlanta

Business Info

[Edit](#)

Relationship Name

T. T. T.

Annual Revenue

USD 50,000.00

[Click on Go to Dashboard to upload supporting documentation](#)



Your application was submitted! What's next?

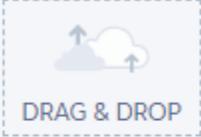
1. The team at the credit union will review your application.
2. Please upload the requested documents that are reflected on your dashboard. We will e-mail you if additional documents are required. Once a completed package is received the underwriting process will begin.

Note: If applying for the [SBA PPP Forgiveness Product](#), please upload documentation to support payroll and non-payroll costs as well as the SBA 3508 form.
3. The Credit Union will notify you of a loan decision, and once approved, the outstanding items needed to close.
4. Once all outstanding items are received and reviewed by the credit union, you'll sign closing documents to receive your loan proceeds.

[Go to Dashboard](#)

Upload Document- Documents will reflected that they have been uploaded.

Upload documents
Please upload required documents. Successfully uploaded documents will appear in the Upload Documents section.
Please direct all questions to info@mbfs.org.


DRAG & DROP
or browse

Uploaded:  Doc1.docx


Remove