



CPA **Business Funding** Portal

Live PPP Service Updates

March 23, 2021

Firm Verification Process & Background

Why it matters

The Business Funding Portal is a PPP funding resource for CPA firms, Accounting Firms, Tax Professionals, Attorneys, Enrolled Agents (EA), and Certified Financial Planners (CFP) actively supporting clients as part of the PPP application process.

The CPA Business Funding Portal must maintain standards related to users of the platform, and ensure the rules and guidelines established by the Small Business Administration (SBA) to prevent fraud are properly followed.

As such, it is critical that we are able to verify users of the platform.

Items to note:

- All users *must* be verified relative to the terms of the user agreement
- If we are unable to verify you as a CPA, Tax Preparer, Accountant, or other appropriately licensed professional, we will not be able to provide you with access to the platform
- Applications are monitored for their quality, integrity and legitimacy. Suspicious or questionable activity related to your account will result in the immediate suspension of your applications and possible account de-activation.
- For Premium and Enterprise users, we will refund subscription fees upon request, however, that will make your account ineligible to receive agent fees. To request a refund, please email cpasupport@biz2credit.com