CPA Business Funding Portal

Live PPP Service Updates

April 1, 2021

Verified Firm Processing

We continue to take action to ensure the CPA Business Funding Portal is used to generate and submit verified applications. We are implementing new procedures with this objective as their primary purpose.

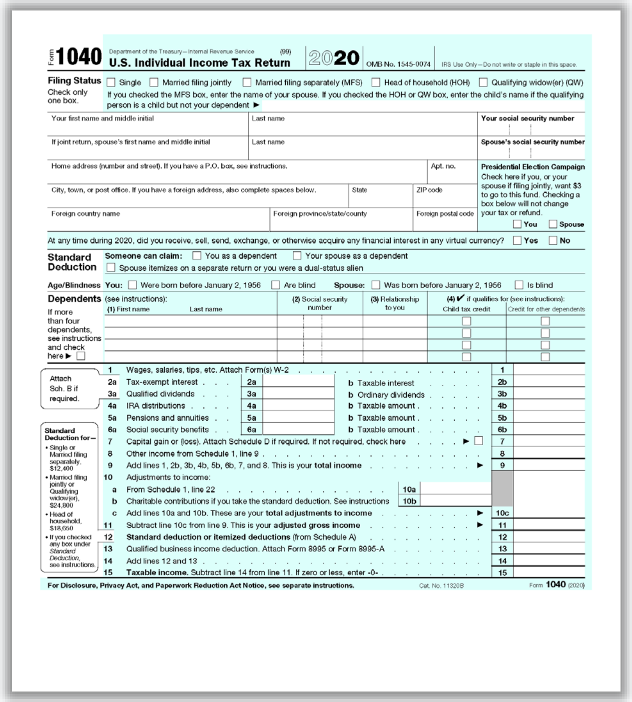
Going Forward for Firms Wanting to Submit New Applications:

- Verified CPA or Controls review required
- Next Steps: Announcement coming later today

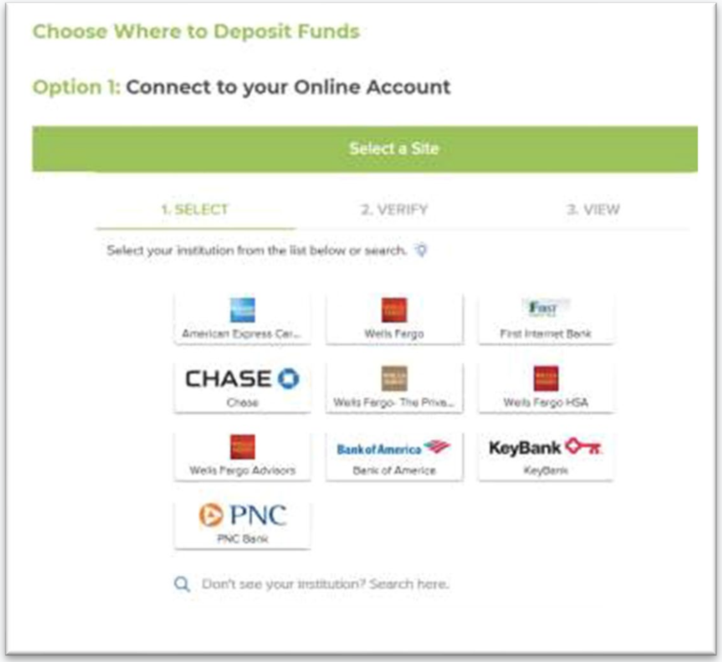
Additional Verification Steps

As we take action to ensure the CPA Business Funding Portal is used to generate and submit verified applications, our teams may be reaching out to you and your clients for some further documentation to complete this necessary due diligence.

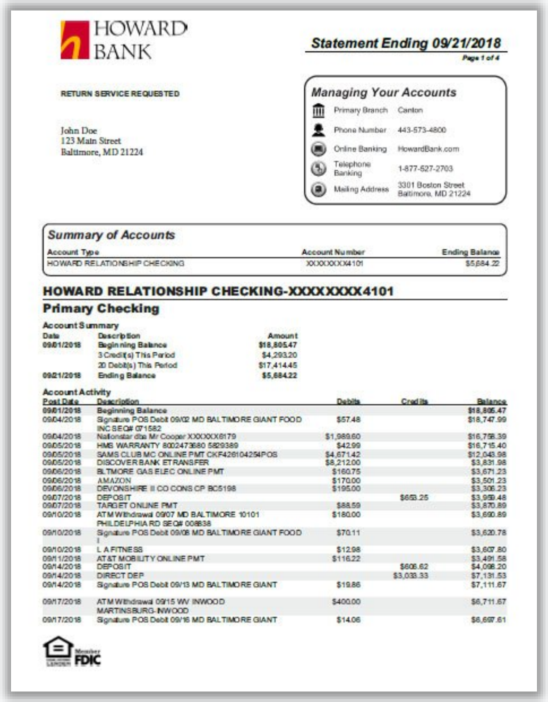
IRS Form 1040 (Tax Return)



Online Account Verification



Bank Statement



Portal Processing Status

Process Improvement

Portal updates continue to improve the firm experience and allow application processing to occur more smoothly for firms and clients.

Engagement with clients by Biz2Credit continues to be refined to provide firms with more visibility and input into post-submission processing.

Spotlight on Verification

The CPA Business Funding Portal is designed for appropriately **licensed professionals and advisers**. Non-verified firms may not use the Portal.

In accordance with **SBA rules** applications on the CPA Business Funding Portal must be true and complete, and all documentation must be accurate.

Important Reminders

P&L documents must be signed by client when over $150,000.

Schedule C documentation cannot be editable or be modified by a firm prior to submission.

ACH details for clients must be business checking / deposit accounts that are supported by accurate voided checks, bank letters or statements.