



In order to better serve you, please complete the following information and forward to your BP representative so that we can better understand how we may be of service to you. If you would like to speak with a specialist of the Berntson Porter PPP forgiveness team, we will contact you to discuss your loan, and questions you have, as well as discuss the various levels of service you can engage the BP team to assist. Please see [BP Blast from June 5<sup>th</sup>](#) for additional details on our service offerings.

General information:

1. Company name \_\_\_\_\_
  - a. Is company part of an affiliated group? If so, please provide names of other entities and funding amounts.  
\_\_\_\_\_
2. Did you receive a PPP Loan?    Yes    No    If so, what was the amount of the loan? \_\_\_\_\_
3. Bank name \_\_\_\_\_ Contact person \_\_\_\_\_ Contact info \_\_\_\_\_
4. Would you like a Berntson Porter PPP forgiveness team member to contact you?    Yes    No  
If you answered "yes", please complete the additional information below to help us better understand your needs. If you answered "no", please stop here.

Payroll and employee information:

1. Number of employees at the date of loan application \_\_\_\_\_
2. Number of current employees \_\_\_\_\_
3. Payroll schedule -    weekly    biweekly (every other week)    twice a month    monthly    other
4. Do you utilize a third party payroll service, and if so, which one? \_\_\_\_\_
5. Do you expect to use the full loan amount on payroll costs during the covered period?    Yes    No
6. Which bank funded the loan \_\_\_\_\_
7. Funding date (what day did it hit your bank account) \_\_\_\_\_ Separate (new) account?    Yes    No
8. Do you expect to use the    8-week or    24-week covered period?
9. Did you reduce the annual salary or hourly wages of any employee by more than 25% during the covered period?  
Yes    No
10. Did you reduce the number of employees or average paid hours paid between 1/1/20 and the end of the covered period?    Yes    No
11. Was your business unable to operate at the same level of activity due to compliance with requirements established by a governmental agency related to work or safety requirements, including social distancing?    Yes    No

Other:

1. Please use this space to provide any other information that may be helpful for our team to know prior to contacting you to discuss your PPP loan forgiveness.  
\_\_\_\_\_  
\_\_\_\_\_

Contact information:

1. Primary contact name and title \_\_\_\_\_
2. Primary contact email \_\_\_\_\_
3. Primary contact phone number \_\_\_\_\_

Thank you for your time in completing this form. If you answered yes to question 4 in the general section, a specialist of the Berntson Porter PPP forgiveness team will be in touch shortly! Please send this completed form to [nwright@bpcpa.com](mailto:nwright@bpcpa.com).