Paycheck Protection Program (PPP) - Forgiveness

When and how to use the Portal for forgiveness application(s)

Portal Forgiveness Capabilities	*Biz2Credit Funded Loans*	*Alternate Lender Funded Loans*
Assess borrower's eligibility for forgiveness	✓	✓
Prepare a forgiveness application *(By the CPA/Firm or Borrower)*	✓	✓
Accumulate appropriate documents	✓	✓
Generate an application package for submission to the SBA	✓	✓ *
Automatically process an application for submission to the SBA	✗	✗
Check requirements of the submission process for lender's other than Biz2Credit	*n/a*	✗
Link or connect with other PPP platforms (ex. bank or fintech)	*n/a*	✗

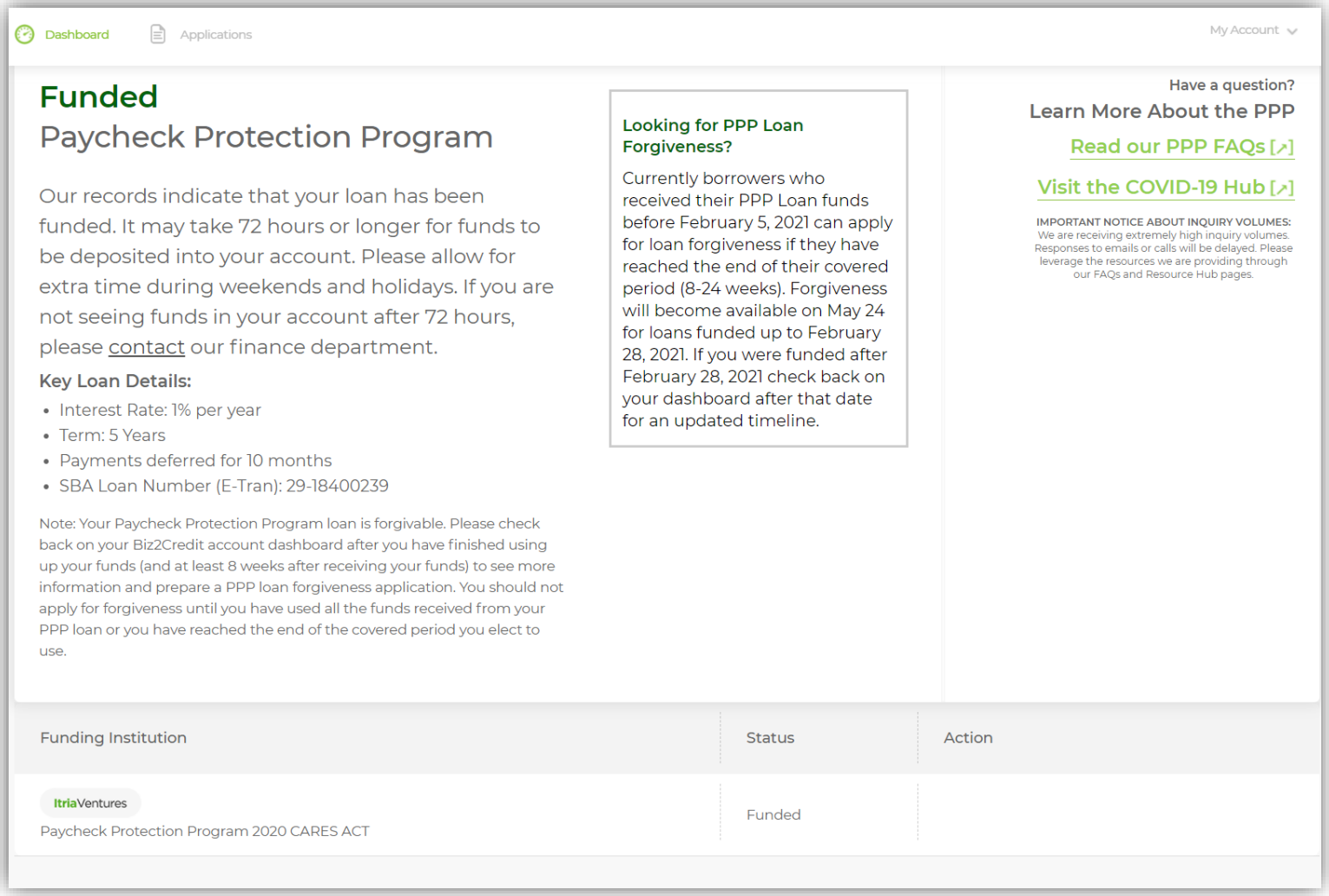
*We highly recommend that CPA's & borrower's understand alternate lender needs *prior* to using the Portal for forgiveness. Borrower can generate a package + cover letter for alternate lender then work with Biz2Credit for any additional needs for submission to the SBA.

A service of CPA.com

CPA Business Funding Portal

Steps to Assign a Forgiveness Application to a Borrower

Before Assignment to Borrower ~ Borrower / Client View on Biz2Credit Customer Portal:



biz2credit

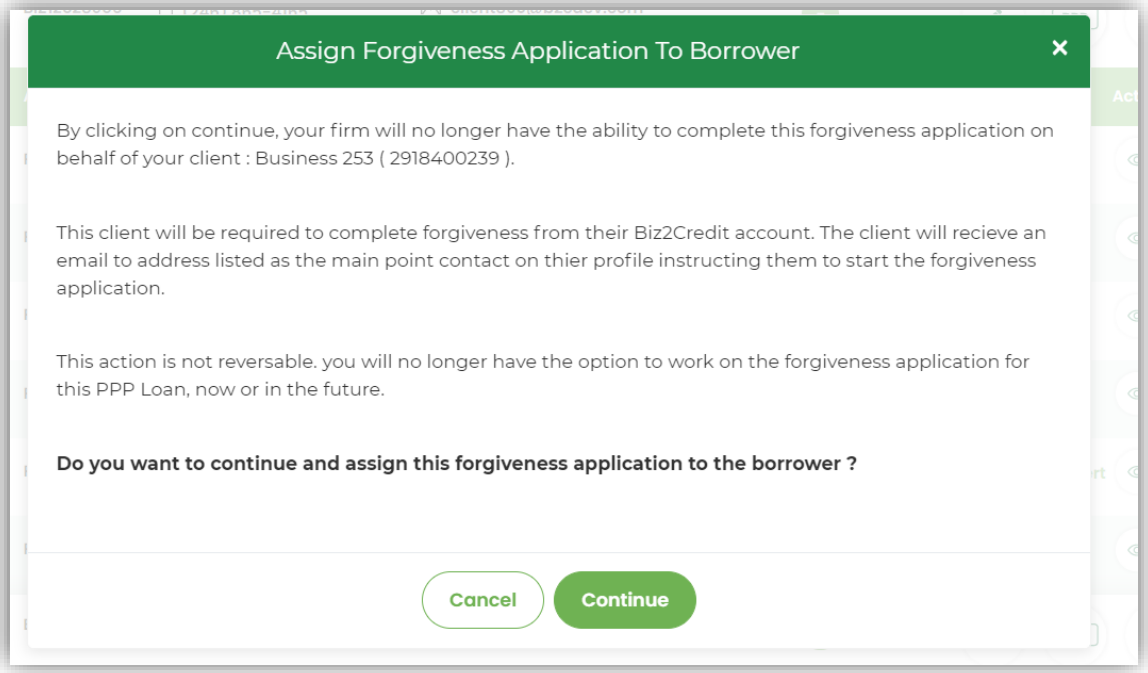
CPA Business Funding Portal

1. Click the 3 ellipses in the CPA firm dashboard > Within the dropdown choose: “Assign Forgiveness App to Borrower”

2. Confirmation Popup:

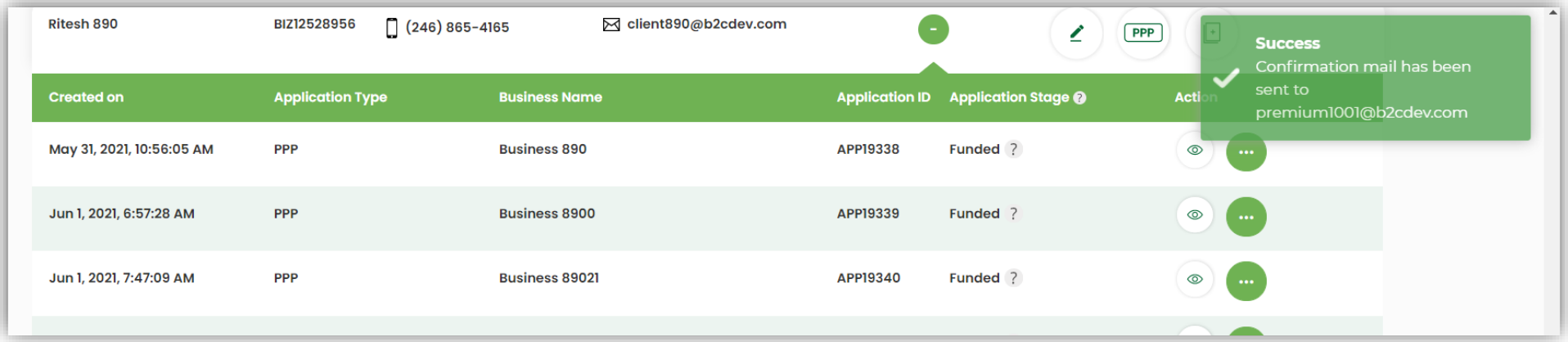
Read popup carefully.

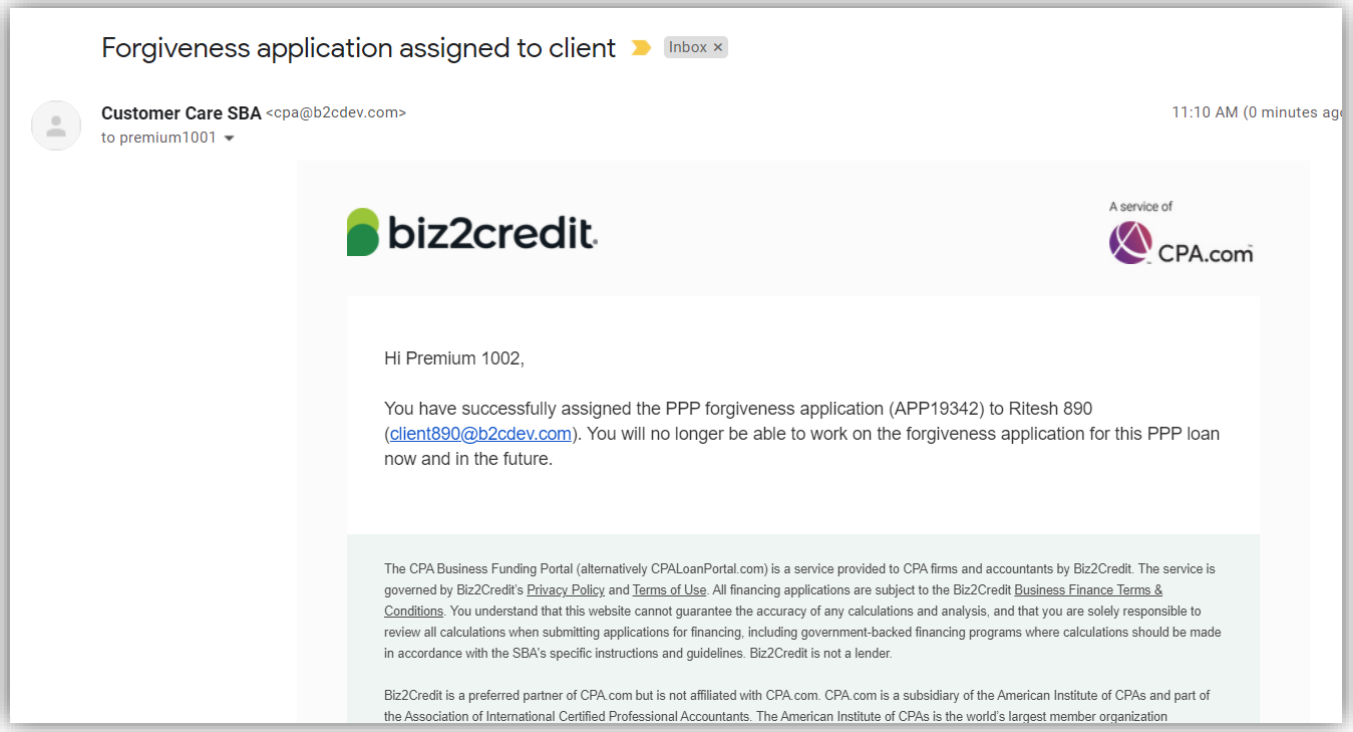
By clicking ‘continue,’ your firm will no longer be able to complete the forgiveness application for your client.



CPA Business Funding Portal

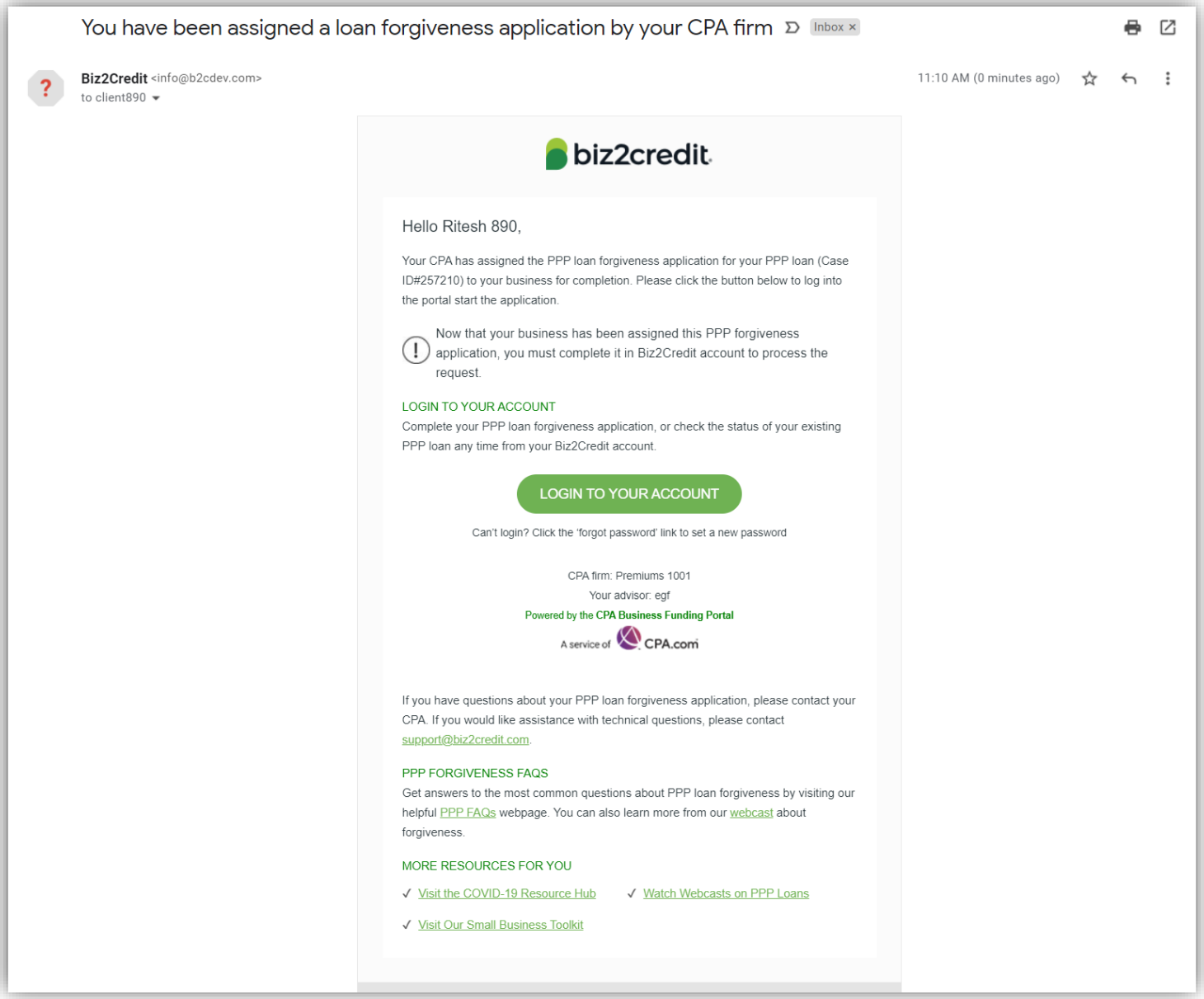
3. After confirming the assignment, an email will be sent to the CPA firm email address on file:





CPA Business Funding Portal

4. In tandem, an email will be sent to the client / borrower associated with the application:



You have been assigned a loan forgiveness application by your CPA firm Inbox ×

Biz2Credit <info@b2cdev.com>
to client890

11:10 AM (0 minutes ago)

biz2credit

Hello Ritesh 890,

Your CPA has assigned the PPP loan forgiveness application for your PPP loan (Case ID#257210) to your business for completion. Please click the button below to log into the portal start the application.

Now that your business has been assigned this PPP forgiveness application, you must complete it in Biz2Credit account to process the request.

LOGIN TO YOUR ACCOUNT

Complete your PPP loan forgiveness application, or check the status of your existing PPP loan any time from your Biz2Credit account.

LOGIN TO YOUR ACCOUNT

Can't login? Click the 'forgot password' link to set a new password

CPA firm: Premiums 1001

Your advisor: egf

Powered by the **CPA Business Funding Portal**

A service of CPA.com

If you have questions about your PPP loan forgiveness application, please contact your CPA. If you would like assistance with technical questions, please contact support@biz2credit.com.

PPP FORGIVENESS FAQS

Get answers to the most common questions about PPP loan forgiveness by visiting our helpful PPP FAQs webpage. You can also learn more from our webcast about forgiveness.

MORE RESOURCES FOR YOU

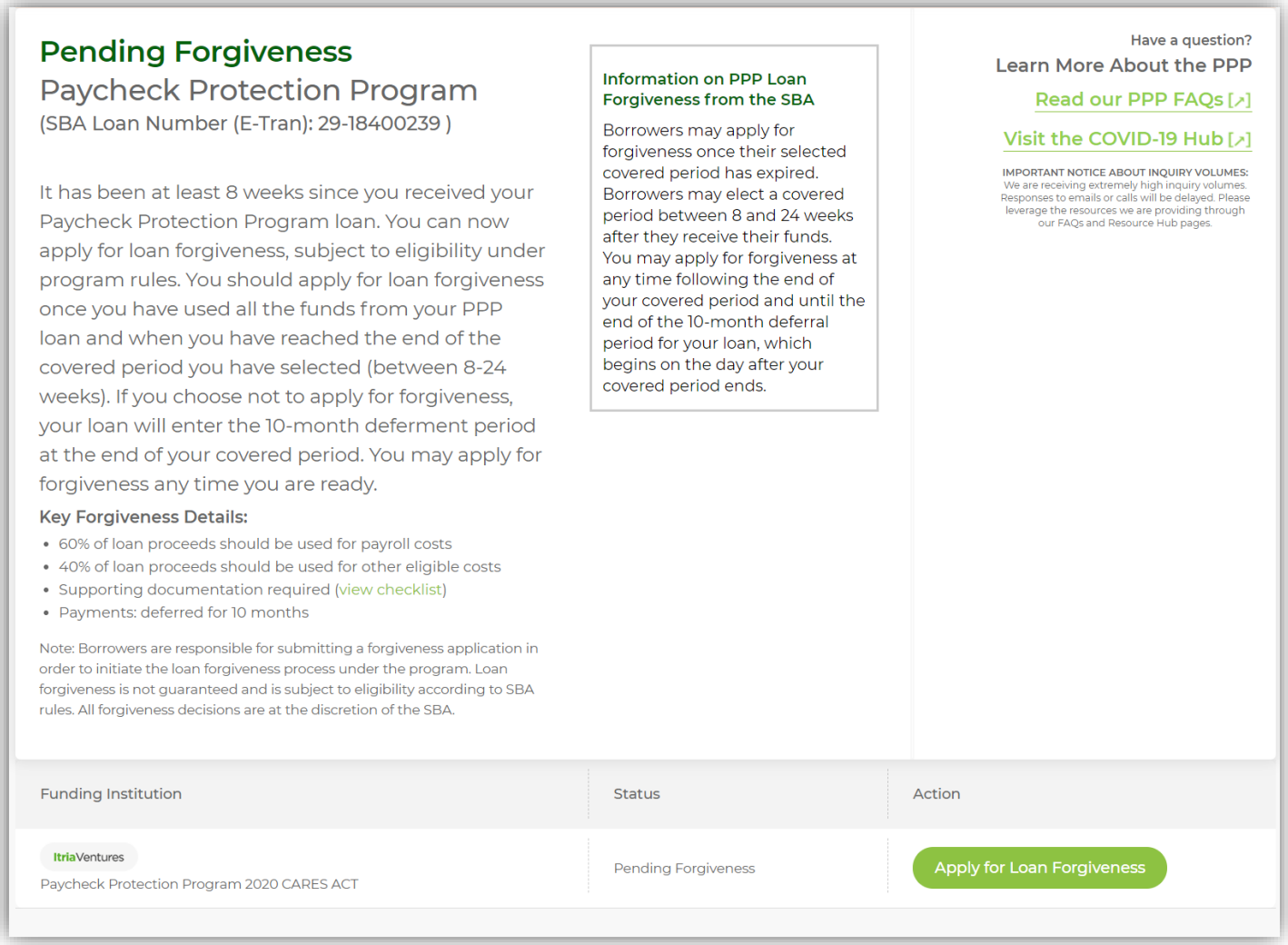
✓ Visit the COVID-19 Resource Hub ✓ Watch Webcasts on PPP Loans

✓ Visit Our Small Business Toolkit

CPA Business Funding Portal

After Assignment to Borrower ~ Borrower / Client View on Biz2Credit Customer Portal:

5. Borrower can then log in to their account to start their forgiveness application:



Reminder:

After application assignment to the borrower on the CPA Business Funding Portal, the CPA firm will *not* have access to assign forgiveness app to borrower and start forgiveness app on their behalf.