



MSP ASCEND

SUPPORTING DOCUMENT CHECKLIST

We strongly recommend gathering these documents prior to applying online. The online application will request upload of documents in many sections of the application. When you are ready to apply, visit: <https://tinyurl.com/MSPAscendApplication>

A. Company Information

- ☐ Company Operating Agreement (original and amendments; if applicable)
- ☐ Shareholder agreements, minutes of stockholder meetings, by-laws, amendments (if applicable)
- ☐ Copy of stock certificate or signed document of ownership share breakdown (if applicable)

B. Ownership Information

- ☐ Resume of each owner
- ☐ Personal Net Worth (PNW) Statements for each owner <https://tinyurl.com/MSPAscendPNW>
- ☐ Personal tax records from each owner for the last 3 years
- ☐ Proof of owner contributions to acquire the company
- ☐ Any documents showing transfer of assets to and from previous or current owners, etc. (if applicable)
- ☐ Copies of loans used to start your company, including reason or the loan, payment history, and payment schedule (if applicable)

C. Business Financial Information

- ☐ Company tax returns for the last 5 years showing gross revenue
 - ☐ Gross Revenues to date for current year

D. Employees and Contracted Employees

- ☐ List of employees showing names, titles, pay rate, part-time or full-time

E. Specialized Business and/or Individually-Held Licenses, Certifications, etc.

- ☐ Copies of specialized licenses, certifications, or permits for your business or held by an employee of your company, if applicable.

F. Equipment

- ☐ List of equipment (major equipment and any tools); pictures may also be provided.

H. Declaration of Eligibility

- a. Signed MSP ASCEND Declaration of Eligibility (DOE) forms from each owner (this form can be found here: <https://tinyurl.com/AscendDOE>)

If you have any questions, please reach out to SmallBusiness@mspmac.org.