



PPP FORGIVENESS NAVIGATION

1. Navigate to the Leader Bank Forgiveness page at <https://www.leaderbizloans.com/PPPForgiveness.html>
2. Click **START HERE**.



3. Complete the acknowledgement screens and navigate to the forgiveness portal login page.
4. Enter the username exactly as it appears in the invitation email (without special characters), and your TIN without dashes (XXXXXXXXX).

Returning Applicant

This must match what you entered on the original application form.

Business Name

TIN/EIN/SSN

Next

5. You will see your loan information:

1 Loan Application 2 File Uploads 3 Review & Submit 4 Confirmation

Previous Next

Save Information	Business Legal Name Fiserv Test Account	Business Phone 7816418601	Loan Disbursement Date 06/30/2020	Disbursed Loan Amount \$150,000.00
Continue to Upload Files	TIN/EIN/SSN 555115555	Email <input type="text" value="PDAABOUL@LEADERBAN"/>	Estimated Forgiven Amount: \$150,000.00	
Knowledge Center	Institution Name LEADER BANK, N.A.	Additional OTP Email <input type="text"/>	Estimated Amount Not Forgiven: \$0.00	

6. Navigate down to select the appropriate form for your forgiveness request:

[Save Information](#) [Continue to Upload Files](#) [Knowledge Center](#)

Select Form

3508 EZ Simplified Forgiveness Form

You (the Borrower) can apply for forgiveness of your Paycheck Protection Program (PPP) loan using the SBA Form 3508EZ if at least one of the three bullets below apply to you.

- The Borrower is a self-employed individual, independent contractor, or sole proprietor who had no employees at the time of the PPP loan application and did not include any employee salaries in the computation of average monthly payroll in the Borrower Application Form (SBA Form 2483).
- The Borrower did not reduce annual salary or hourly wages of any employee by more than 25 percent during the Covered Period or the Alternative Payroll Covered Period (as defined below) compared to the period between January 1, 2020 and March 31, 2020 (for purposes of this statement, "employees" means only those employees that did not receive, during any single period during 2019, wages or salary at an annualized rate of pay in an amount more than \$100,000); **AND** The Borrower did not reduce the number of employees or the average paid hours of employees between January 1, 2020 and the end of the Covered Period. (Ignore reductions that arose from an inability to rehire individuals who were employees on February 15, 2020 if the Borrower was unable to hire similarly qualified employees for unfilled positions on or before December 31, 2020. Also ignore reductions in an employee's hours that the Borrower offered to restore and the employee refused. See 85 FR 33004, 33007 (June 1, 2020) for more details.
- The Borrower did not reduce annual salary or hourly wages of any employee by more than 25 percent during the Covered Period or the Alternative Payroll Covered Period (as defined below) compared to the period between January 1, 2020 and March 31, 2020 (for purposes of this statement, "employees" means only those employees that did not receive, during any single period during 2019, wages or salary at an annualized rate of pay in an amount more than \$100,000); **AND** The Borrower was unable to operate during the Covered Period at the same level of business activity as before February 15, 2020, due to compliance with requirements established or guidance issued between March 1, 2020 and December 31, 2020 by the Secretary of Health and Human Services, the Director of the Centers for Disease Control and Prevention, or the Occupational Safety and Health Administration, related to the maintenance of standards of sanitation, social distancing, or any other work or customer safety requirement related to COVID-19.

3508S Form

A borrower of a PPP loan of \$150,000 or less, other than any borrower that together with its affiliates received loans totaling \$2 million or greater, may use SBA Form 3508S to apply for loan forgiveness. However, only borrowers with loans of \$50,000 or less, other than any borrower that together with its affiliates received First Draw Loans totaling \$2 million or more or Second Draw Loans totaling \$2 million or more, are exempt from any reductions to the loan forgiveness amount. Accordingly, the exemptions in this subsection are limited to qualifying borrowers with loans of \$50,000 or less. A borrower with a loan greater than \$50,000 and up to \$150,000 must comply with the requirements under the Paycheck Protection Program, including calculating any reduction in forgiveness amounts based on reductions in FTEs or employee salary or wages.

3508 Standard Forgiveness Form

If your business does not meet the qualifications above to submit the 3508EZ form or the 3508S form, check here to fill out the standard 3508 Forgiveness Form

- Navigate further down to update your profile information as needed. A red asterisk (*) indicates a required field that must be filled to continue to the next page. Note: The most common fields missing info are the **NAICS code** and **Amount of loan spent on payroll costs**.

Save Information

Continue to Upload Files

Knowledge Center

Loan Forgiveness Information

Loan Identification:

Loan Number **SBA Loan Number**
00000000570048863 666555444

First Draw PPP Loan **Second Draw PPP Loan**

*** Business Legal Name**

Fiserv Test Account

DBA or Tradename if applicable

Business TIN #

555115555

*** NAICS Code**

Click to Learn: **General Info**

Enter the same information as on your Borrower application form.

- When finished updating but ***BEFORE*** moving on to the next page, click **SAVE** to avoid losing your information.

- The next page will allow you to upload documents (only required for Forms 3508EZ and 3508 Standard, not for 3508-S).

1 — 2 — 3 — 4

Loan Application File Uploads Review & Submit Confirmation

Previous

Next

Loan Forgiveness

Documentation requirements are determined by your institution and the SBA. Please contact your financial institution if you have any questions.

Use the box below to upload supporting loan application documents. You may upload Image, PDF, Word, and Excel documents. There is a maximum file size limit of 35MB for each file uploaded. When you are finished, or if you don't have any files to upload, simply click the Next button to proceed to the next step.

Select Files to Upload

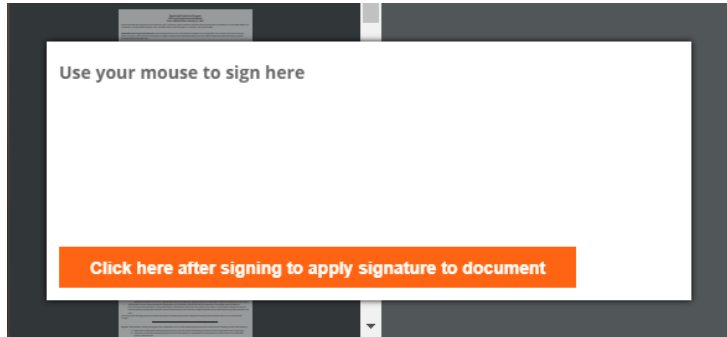
Select Files

Name	Type	Saved
✖ SBA Form 3508EZ_9e91584d-1bc8-4c7a-a090-c7947e0c3792.pdf	SBA Form 3508EZ	08-13-2020
✖ Forgiveness Supporting Docs (Rent/Lease Payments)_May 2020.pdf	Forgiveness Supporting Docs (Rent/Lease Payments)	08-10-2020
✖ Loan Application Supporting Docs (Payroll)_DDA Checking Account Statements - 6_30_2020 (1).pdf	Loan Application Supporting Docs (Payroll)	08-10-2020

Upload

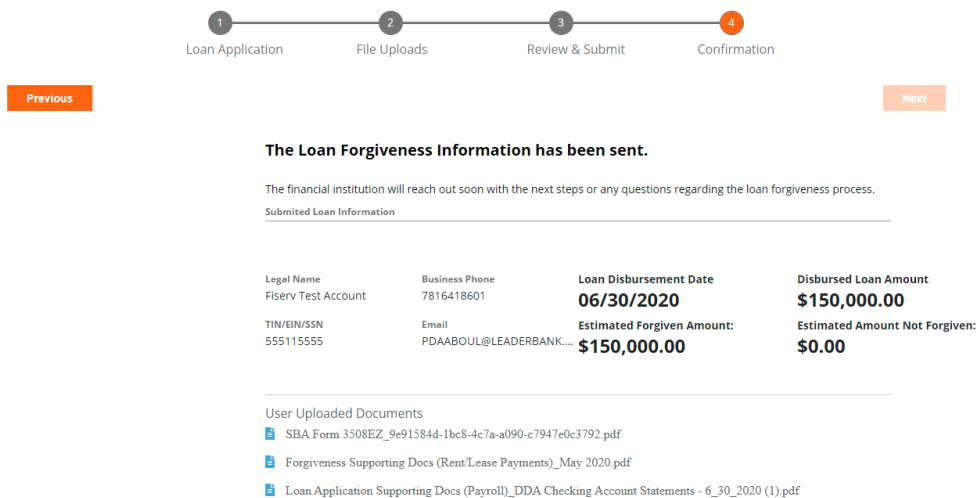
10. When finished, click **NEXT** to move to the signature page.

11. Use your mouse to sign, and then click the **ORANGE BOX** to apply the signature. You may then download a copy and submit to the Bank. Note: If you do not have the option to sign, it means that you did not save the information on the first page, or that that first page is incomplete.



12. Click **FINISH**.

13. The last page will confirm that submitted your application successfully:



1 2 3 4
Loan Application File Uploads Review & Submit Confirmation

Previous Next

The Loan Forgiveness Information has been sent.

The financial institution will reach out soon with the next steps or any questions regarding the loan forgiveness process.

Submitted Loan Information

Legal Name	Business Phone	Loan Disbursement Date	Disbursed Loan Amount
Fiserv Test Account	7816418601	06/30/2020	\$150,000.00
TIN/EIN/SSN	Email	Estimated Forgiven Amount:	Estimated Amount Not Forgiven:
555115555	PDAABOUL@LEADERBANK...	\$150,000.00	\$0.00

User Uploaded Documents

- SBA Form 3508EZ_9e91584d-1bc8-4c7a-a090-c7947e0c3792.pdf
- Forgiveness Supporting Docs (Rent/Lease Payments)_May 2020.pdf
- Loan Application Supporting Docs (Payroll)_DDA Checking Account Statements - 6_30_2020 (1).pdf