



## PPP Loan Compliance & Tracking Interest Form

### Consulting Engagement Objective -

Assist Businesses with the PPP Loan planning & strategy, expense tracking, documentation, loan forgiveness calculation and request. We understand businesses have varying capacity and ability to address these requirements within a short amount of time. If you are interested in our assistance, please complete this form and we will contact you within 1 business day to follow up.

### Our Commitment -

We will stay current on all updates coming from SBA and the Treasury, and update you and our templates accordingly. We will tailor the engagement to your unique needs.

### Fees -

Our minimum fee is \$1,500 Retainer, due upon engagement.

### Level of Services (Select One)

#### Option A (Consulting and Templates)

3 hours consulting with partner/manager/associate; Templates to complete forgiveness calculation and updates from PEA throughout. Hourly rates beyond the 3 hours will be at the standard hourly rates of the associate working on the engagement ranging from \$200 to \$425 per hour.

#### Option B (Consulting, Planning and Templates)

3 hours consulting with partner/manager/associate; Development of a basic Plan to Use PPP loan proceeds; Preparation of the templates based on information provided by you; Updates from PEA throughout the engagement. Hourly rates beyond the 3 hours will be at the standard hourly rates of the associate working on the engagement ranging from \$200 to \$425 per hour.

#### Option C (Consulting, Planning, Templates and Execution Assistance)

3 hours consulting with partner/manager/associate; Development of a Plan to Use PPP loan proceeds; Preparation of the templates based on information provided by you; Assistance in completing the loan forgiveness request; Updates from PEA throughout the engagement. Hourly rates beyond the 3 hours will be at the standard hourly rates of the associate working on the engagement ranging from \$200 to \$425 per hour.



## Information about the Company

Name of Company:

Primary Contact for engagement:

Email address for primary contact:

Phone number for primary contact:

Name of Bank (PPP Loan):

Bank point of contact, if any:

Amount of PPP Loan:

Date funds deposited to your account:

Number of employees:

Number of FTEs (use 40hr denominator):

What is your payroll cycle?

Name of Payroll Servicer or In-house:

Accounting software used (general ledger):

Do you have "seasonal employees"? If yes, how many?

Do you have access to our portal to upload documents?

Specific concerns we should be aware of?

Will your business be operating at normal capacity, reduced capacity, or virtually closed during this 8-week period?

Please e-mail completed forms to Mary at [mmm@politoeppich.com](mailto:mmm@politoeppich.com)