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California Small Business COVID-19 Relief Grant Program. This Program is funded by the State of California and administered by CalOSBA.

A photograph of a man and a woman in a cafe setting. The man, with grey hair and glasses, is wearing a grey t-shirt and a brown apron. The woman, with dark hair, is wearing a dark t-shirt and a brown apron. They are both smiling and looking towards the camera. The background shows a cafe interior with shelves and a counter.

California Small Business COVID-19 Relief Grant

**This Program is now closed and grant awards
longer available.**

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IMPORTANT INFORMATION FOR 2023 TAX RETURNS

1099 Tax Forms Now Available for Download

If you received a grant for this program in 2023, you are required to report it on your upcoming 2023 tax returns. In order to do so, you will need to retrieve a copy of your 1099 tax form.

How can you retrieve your 1099 tax form?

Your 1099 tax form is available at <https://tax1099.com/edelivery/login>. **CLICK HERE** for a guide on how to retrieve your 1099 tax form with step-by-step instructions.

This guide also provides information on your username and password that is needed to sign in. Once signed in, you may elect to opt-in to download your 1099 tax form electronically or opt-out to receive it by mail.

For assistance with accessing your 2023 tax form please contact 1099request@lendistry.com.

Important Note: Lendistry and its affiliates do not provide tax, legal or accounting advice. This material has been prepared for informational purposes only and is not intended to provide, and should not be relied on for, tax, legal or accounting advice. Readers should consult their own tax, legal and accounting advisors before completing their tax filings.

THERE ARE NO WARRANTIES, EXPRESSED OR IMPLIED, AS TO ACCURACY, COMPLETENESS, OR RESULTS OBTAINED FROM ANY INFORMATION POSTED IN THIS PRESENTATION OR ANY LINKED WEBSITE.

PLEASE NOTE: Lendistry is the sole entity designated as the Intermediary of the California Small Business COVID-19 Relief Grant Program (the “Program”). This site (careliefgrant.com) and the other websites available on or through this site (the “Designated Sites”) are the only approved websites designated for the administration of the Program. Any other website purporting to administer or otherwise act as an Intermediary in connection with the Program may be fraudulent. As such, you should exercise extreme caution and avoid providing any information (personal or otherwise) in connection with the Program on or through any website other than the Designated Sites. Further, neither Lendistry nor any of its partners will charge any fees to apply for a relief grant under the Program and we recommend that you avoid any third-parties purporting to charge fees for you to apply.

Ineligible Businesses

A. Businesses without a physical presence in the state and not headquartered in the state.

B. Businesses primarily engaged in political or lobbying activities, regardless of whether the entity is registered as a 501(c)(3), 501(c)(6), or 501(c)(19).

C. Passive businesses, investment companies, and investors who file a Schedule E on their tax returns.

D. Financial institutions or businesses primarily engaged in the business of lending, such as banks, finance companies, and factoring companies.

E. Businesses engaged in any activity that is unlawful under federal, state, or local law.

F. Businesses that restrict patronage for any reason other than capacity.

G. Speculative businesses.

H. Businesses with any owner of greater than 10 percent of the equity interest in it who meets one or more of the following criteria:

i. The owner has, within the prior three years, been convicted of or had a civil judgment rendered against the owner, or has had commenced any form of parole or probation, including probation before judgment, for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local public transaction or contract under a public transaction, violation of federal or state antitrust or procurement statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.

ii. The owner is presently indicted for or otherwise criminally or civilly charged by a federal, state, or local government entity, with commission of any of the offenses enumerated in clause (i).

I. Affiliated companies, as defined in Section 121.103 of Title 13 of the Code of Federal Regulations.

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J. Other businesses determined by the office, consistent with the limitations and exclusions set in Rounds 1 and 2 of the COVID-19 Relief Grant Program. “Rounds 1 and 2 of the COVID-19 Relief Grant Program” means the first two rounds of grant allocations awarded, prior to the enactment of this article, through the COVID-19 Relief Grant that is administered by CalOSBA and that is funded by Executive Order No. E 20/21-182.

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How will grant recipients be determined?

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Lendistry will analyze for selection all applications entered into the Portal.

Lendistry will consult with the California Office of the Small Business Advocate (CalOSBA or the “office”) and design the program selection for prioritization of impacted businesses. Grants will be prioritized, to the extent permissible under state and federal equal protection laws, in accordance with the following criteria:

1. Geographic distribution based on COVID-19 health and safety restrictions following California’s Blueprint for a Safer Economy and county status and the Regional Stay at Home Order.

2. Industry sectors most impacted by the pandemic, including, but not limited to, those identified as in the North American Industry Classification System codes beginning with:

61 – Educational Services

71 – Arts, Entertainment, and Recreation

72 – Accommodation and Food Services

315 – Apparel Manufacturing

448 – Clothing and Clothing Accessory Stores

451 – Sporting Goods, Hobby, Musical Instrument, and Book Stores

485 – Transit and Ground Passenger Transportation

487 – Scenic and Sightseeing Transportation

512 – Motion Picture and Sound Recording Industries

812 – Personal and Laundry Services

5111 – Newspaper, Periodical, Book and Directory Publishers

3. Nonprofit mission services most impacted by the pandemic, including, but not limited to, emergency food provisions, emergency housing stability, childcare, and workforce development.

4. Disadvantaged communities tracked by socioeconomic indicators that may include, but are not limited to, low to moderate-income, poverty rates,

unemployment, educational attainment, and other disadvantaging factors limit access to capital and other resources.

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Grants to eligible nonprofit cultural institutions will be prioritized on documented percentage revenue declines based on a reporting period comparing Q2 and Q3 of 2020 versus Q2 and Q3 of 2019.

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ELIGIBILITY REQUIREMENTS

Eligible Businesses

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A small business or small nonprofit must satisfy the following criteria to be eligible to receive a grant award:

1. Must meet the definition of a “qualified small business”. “Qualified small business” means a business or nonprofit that meets all of the following criteria, as confirmed by the office or fiscal agent through review of revenue declines, other relief funds received, credit history, tax returns, and bank account validation:

A. Is one of the following:

- i. A sole proprietor, independent contractor, 1099 employee, C-corporation, S-corporation, cooperative, limited liability company, partnership, or limited partnership, with an annual gross revenue of less than five million dollars (\$5,000,000), but greater than one thousand dollars (\$1,000), in the 2019 taxable year.
- ii. A registered 501(c)(3), 501(c)(6), or 501(c)(19) nonprofit entity that had an annual gross revenue of less than five million dollars (\$5,000,000), but greater than one thousand dollars (\$1,000), in the 2019 taxable year.
- iii. A division or department of a larger organization or entity, such as a tribal government, city, county, or city and county.
- iv. An organization that is fiscally sponsored by a nonprofit corporation.

B. Began operating in the state prior to June 1, 2019.

C. Is currently active and operating, or has a clear plan to reopen when the state permits reopening of the business.

D. Has been impacted by COVID-19 and the related health and safety restrictions, such as business interruptions or business closures incurred as a result of the COVID-19 pandemic.

E. Provides organizing documents, such as a 2019 tax return or Form 990, an affidavit from the board or authorizing official from the governing authority,

detailing the governance structure; or a copy of an official filing with the Secretary of State or with the local municipality, as applicable, including, but not limited to, Articles of Incorporation, Certificate of Organization, Fictitious Name of Registration, or Government-Issued Business License.

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F. Provides an acceptable form of government-issued photo identification, where applicable.

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Ineligible Businesses

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- A. Businesses without a physical presence in the state and not headquartered in the state.
- B. Businesses primarily engaged in political or lobbying activities, regardless of whether the entity is registered as a 501(c)(3), 501(c)(6), or 501(c)(19).
- C. Passive businesses, investment companies, and investors who file a Schedule E on their tax returns.
- D. Financial institutions or businesses primarily engaged in the business of lending, such as banks, finance companies, and factoring companies.
- E. Businesses engaged in any activity that is unlawful under federal, state, or local law.
- F. Businesses that restrict patronage for any reason other than capacity.
- G. Speculative businesses.
- H. Businesses with any owner of greater than 10 percent of the equity interest in it who meets one or more of the following criteria:
 - i. The owner has, within the prior three years, been convicted of or had a civil judgment rendered against the owner, or has had commenced any form of parole or probation, including probation before judgment, for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local public transaction or contract under a public transaction, violation of federal or state antitrust or procurement statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.
 - ii. The owner is presently indicted for or otherwise criminally or civilly charged by a federal, state, or local government entity, with commission of any of the offenses enumerated in clause (i).
- I. Affiliated companies, as defined in Section 121.103 of Title 13 of the Code of Federal Regulations.
- J. Other businesses determined by the office, consistent with the limitations and

exclusions set in Rounds 1 and 2 of the COVID-19 Relief Grant Program. “Rounds 1 and 2 of the COVID-19 Relief Grant Program” means the first two rounds of grant allocations awarded, prior to the enactment of this article, through the COVID-19 Relief Grant that is administered by CalOSBA and that is funded by Executive Order No. E 20/21-182.

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FUNDING ROUNDS

Round 7: CLOSED

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Eligible applicants: This is a closed round and only available to eligible applicants who were waitlisted in certain previous rounds – only existing waitlisted applicants will be selected to move forward in the validation and verification review process. Selection does not guarantee approval or an award. If you were waitlisted, you do not need to reapply. ***New applications will not be accepted in this round.***

Eligible grant award: \$5,000 to \$25,000

Details: This is a closed funding round; no new applications will be accepted

Round 8: CLOSED

Eligible applicants: Only non-profit cultural institutions with any revenue size that meet eligibility criteria found at CAREliefGrant.com

Eligible grant award: \$5,000 – \$25,000

Details: Approximately \$16 Million dollars remain under the Nonprofit Cultural Institutions Program. Eligible nonprofit cultural institutions must complete a new application even if they already applied in Rounds 1,2, 5, or 6.; nonprofit cultural institutions that applied in Round 4 do not need to re-apply; grants will only be available to nonprofit cultural institutions that did not receive funding in any previous rounds; grants will be prioritized based on the documented

percentage revenue declines based on a reporting period comparing Q2 and Q3 of 2020 versus Q2 and Q3 of 2019

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Round 9: CLOSED

Eligible applicants: current waitlisted applicants from certain previous rounds and ***new applicants*** that meet eligibility criteria found at CAReliefGrant.com

Eligible grant award: \$5,000 – \$25,000

Details: Applicants not selected to move forward in the review process in Rounds 1, 2, 3, 5, 6, or 7 do not need to re-apply and will be automatically moved into Round 9. New applicants will need to apply at CAReliefGrant.com

APPLICATION GUIDE FOR ROUNDS 8 AND 9

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APPLICATION CERTIFICATION DOWNLOADS

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KEY INFORMATION

Necessary documents :

1. Application Certification: Signed certification used to certify your business
2. Business Financial Information:
 - a. 2019 Federal Tax Return – provided in an electronic form for online uploads, such as PDF/JPEG or other approved upload format.
 - b. Copy of official filing with the California Secretary of State, if applicable, or local municipality for the business such as one of the following: Articles of Incorporation, Certificate of Organization, Fictitious Name of Registration, or Government-Issued Business License.
3. Government Issued Photo ID: Such as a Driver's License or Passport

One complete application will qualify you to be considered for both rounds, please only apply once.

Applying through multiple organizations will delay your application from being processed.

Owners of multiple businesses, franchises, locations, etc. will be considered for only one grant and are required to apply for the business with the highest revenue.



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GRANT AMOUNTS

The amount of grant funding ranges from \$5,000 to \$25,000. Businesses are eligible based on their annual revenue as documented in their 2019 Federal Tax Return:

Eligible Businesses Annual Revenue	Grant Amount Available Per Business
\$1,000 to \$100,000	\$5,000
Greater than \$100,000 up to \$1,000,000	\$15,000
Greater than \$1,000,000 up to \$5,000,000	\$25,000

REQUIRED DOCUMENTS



APPLICATION CERTIFICATION

Signed certification used to certify your business



BUSINESS FINANCIAL INFORMATION

2019 Federal Tax Return – provided in an electronic form for online upload, such as PDF/JPEG or other approved upload format.

Copy of official filing with the California Secretary of State, if applicable, or local municipality for the business such as one of the following: Articles of Incorporation, Certificate of Organization, Fictitious Name of Registration or Government-Issued Business License.

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GOVERNMENT ISSUED PHOTO ID

Such as a Driver's License or Passport



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