

RISE Opportunity Fund Document Checklist

Dear Applicant,

Thank you for your interest in the RISE Opportunity Fund. Once your application is received and reviewed, if you qualify, you will receive instructions via email detailing how to upload the following documents via the unique link provided to you.

We encourage you to gather all documents at one time and use the document checklist as a guide. You must combine all documents into one PDF. If you do not have Adobe, mobile apps such as GeniusScan or Apple Notes are options for creating PDFs. Please note, screenshots or photos of documents taken with a cell phone are not acceptable. Failure to provide the required documentation, in the required format, could delay the review and decision process and deem your incomplete and therefore ineligible for consideration.

Required Documents:

- ___ W-9 form
- ___ Record of Account Transcript for 2022 Business Tax Returns
(www.irs.gov/individuals/transcript-types-and-ways-to-order-them)
- ___ 2024 Year to Date Sales, and 2022, 2023 Year End Sales
- ___ Proof of business checking account (last 6 Months of bank statements)
- ___ Profit & Loss and Balance Sheet
- ___ Articles of Incorporation
- ___ EIN Certification Letter
- ___ Operating Agreement (if applicable)
- ___ WDFI Annual Report
- ___ ROF Proposed Use of Funds <https://www.aaccwi.org/wp-content/uploads/2023/09/ROF-Proposed-Use-of-Funds-Template.xlsx>
- ___ Documents to support the proposed use of funds (i.e. receipts, invoices, estimates, payroll records)

As a reminder, the initial review may take up to ninety (90) days, and you may be required to provide clarification, additional information and/or supporting documentation. Please send questions about the application process to riseopportunityfund@aaccwi.org.

For more information about the RISE Opportunity Fund, visit www.aaccwi.org/rof.