

Small Business Certification Checklist

Ensure your business is ready for certification with this step-by-step guide.

1. Determine Eligibility

- ☐ Meet the size standards defined by the certifying agency (e.g., SBA, DBE, WOSB).
- ☐ Ensure majority ownership (51% or more) by qualifying individuals (e.g., women, minorities, veterans).
- ☐ Verify business structure (LLC, corporation, sole proprietorship, etc.).

2. Gather Required Documents

Business Registration & Legal Documents

- ☐ Business license and registration
- ☐ Articles of incorporation or organization
- ☐ Operating agreement or bylaws

Financial & Tax Records

- ☐ Last three years of business tax returns
- ☐ Profit and loss statements
- ☐ Balance sheets

Ownership & Control Proof

- ☐ Stock certificates (if applicable)
- ☐ Partnership or shareholder agreements
- ☐ Proof of day-to-day business control by qualifying individuals

Industry-Specific Licenses & Permits

- ☐ Any professional licenses required for your industry
- ☐ Certifications for specialized services (if applicable)

3. Complete The Application

- ☐ Identify the appropriate certification program (SBA 8(a), WOSB, HUBZone, DBE, etc.).
- ☐ Submit the online or paper application through the correct government agency.
- ☐ Pay any applicable fees (if required).

4. Prepare For Site Visit Or Interview (If Required)

- ☐ Ensure business location is ready for inspection.
- ☐ Be prepared to demonstrate operational control and business decision-making

5. Follow Up & Maintain Certification

- ☐ Track the application status and respond to requests for additional information.
- ☐ Renew certification before expiration.
- ☐ Maintain compliance with ongoing reporting requirements.

■ By following this checklist, your business can smoothly navigate the certification process and unlock valuable government contracting opportunities!