

Houston Equity Fund
Wells Fargo Open for Business Grant Program
ROUND 3 - SMALL BUSINESS FUNDING OPPORTUNITY
APPLICATIONS DUE MARCH 26, 2024, at 11:59pm CST



Supporting Documents and Basic Information Checklist

You will need the following to complete the application:

- Employer Identification Number (EIN)
- Social Security Number (SSN)/ Individual Taxpayer ID Number (ITIN)
- Copy of Driver's License or government issued photo ID
- Document(s) to confirm the address of the business location where the tangible asset will be invested within the [green area of the Geographic Eligibility Map](#) **AND** the primary business address **if it differs from where the tangible asset will be invested**, such as a utility bill, a signed lease, business permit or license, an IRS EIN letter, or a certificate of insurance. **Documentation must contain the name of the business and/or business owner.**
 - Mobile business may provide any of the above documents. If unavailable, mobile businesses may provide one of the following documents:
 - Signed letter from the landlord or property owner stating the address where the mobile business operates.
 - Schedule showing the address where the mobile business operates, such as on a website or promotional flier.
- 2021 and 2022 federal business tax returns with all schedules; 2021 and 2022 personal tax returns including Schedule C for sole proprietorships
- Quote or documentation related to cost and value of tangible asset(s).
 - Acceptable documentation can include a PDF or screenshot from an online vendor, a purchase order, a scope of work, proposal, and/or a proposed contract. **At minimum, the document must contain the name/description of the asset and its cost.**
- Payroll document or IRS 941 for Q4 2023 (for business with 5+ employees)
- Business NAICS Code
- Business Plan (optional, if available)

You will need the following to complete the Supplemental Proposal:

- A Supplemental Budget Request (a template is provided in the application)
- Most recent Annual Profit & Loss Financial Statement
- Most recent Annual Balance Sheet
- Business plan

Note:

- Other financials may be requested or obtained during a final review process
- W-9 will be requested if awarded a grant

Sample Quotes for Asset Price – Supporting Documents

Quote from Company

[CONSTRUCTION COMPANY]		QUOTE		
[log line]				
[Street Address]		DATE: March 14, 2017		
[City, ST ZIP Code]		INVOICE # 100		
Phone (503) 559-0190 Fax (503) 555-0191				
TO:	For	Bill of quantity for construction of...		
[Name]				
[Company Name]				
[Street Address]				
[City, ST ZIP Code]				
Description of Job	Unit	Quantity	Rate in \$/unit	Amount
Providing and laying plain concrete concrete of 1:3:6 [1 Cement : 3 coarse sand : 6 graded stone aggregate 40mm nominal size] in position including the cost of centering and shuttering - All work up to plinth level	Cum	25.53	\$ 150.00	\$ 3,829.50
				\$ -
				\$ -
				\$ -
				\$ -
SUBTOTAL				\$ 3,829.50
TAX RATE				5%
SALES TAX				191.48
OTHER				0.00
TOTAL				\$ 4,021.00
MATERIALS				
Description	Units	Rate	Amount	
Simple service description	2.00	\$ 100.00	\$ 200.00	
SUBTOTAL				\$ 200.00
TAX RATE				5%
SALES TAX				10.00
OTHER				0.00
TOTAL				\$ 210.00
INVOICE TOTAL to PAY				\$ 4,231.00

Amazon or other retail purchase – Screenshot



2022 HP Pavilion Laptop, 14-inch HD Touchscreen, AMD 3000 Series Processor, 8GB RAM, 192GB Storage, Long Battery Life, Webcam, HDMI, Windows 10 + One Year of Office365, Blue (Latest Model)

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★★★★☆ 148 ratings

| 23 answered questions

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Capacity: Blue

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& FREE Returns

FREE delivery **Wednesday, July 6**. Order within 2 hrs 43 mins

Select delivery location

In Stock.

Qty: 1

Add to Cart

Buy Now

Secure transaction

Ships from Amazon

Sold by Oydisen Electronics (N...

Details

Seller Certifications:

TEXAS RESIDENTIAL REAL ESTATE PURCHASE AGREEMENT

1. Buyer and Seller. This Real Estate Purchase Agreement ("Agreement") made on _____, 20__ ("Effective Date") between _____ ("Buyer") with a mailing address of _____, City of _____, State of _____ who agrees to buy and _____ ("Seller") with a mailing address of _____, City of _____, State of _____, who agrees to sell and convey real and personal property as described in Section 2 of this Agreement. Buyer and Seller shall be collectively known as the "Parties."

2. The Property. The real property is located at the street address of _____, City of _____, State of Texas that is best described as the following:

(check one)

- Single-Family Home
- Condominium
- Planned Unit Development (PUD)
- Duplex
- Triplex
- Fourplex
- Other: _____

Tax Parcel Information (i.e., "Parcel ID" or "Tax Map & Lot"): _____

a.) Personal Property. In addition to the real property described in this Section, the Seller shall include the following personal property: _____

b.) Fixtures. In addition to the real property described in this Section, the Seller DOES NOT include the following fixtures: _____

The real property, personal property, and fixtures shall be known as the "Property".

3. Purchase Price. Buyer agrees to purchase the Property for \$ _____ (_____ Dollars) via: (check one)

- All Cash Offer. No loan or financing of any kind is required in order to purchase the Property. Buyer shall provide Seller written third (3rd) party documentation verifying sufficient funds to close no later than _____, 20__ at ____:____ AM
- PM. Seller shall have three (3) business days after the receipt of such documentation to notify Buyer, in writing, if the verification of funds is not acceptable. If Buyer fails to provide such documentation, or if Seller finds such verification of funds is not acceptable, Seller