



U.S. Women's Chamber of Commerce – Authorized Third Party Certifier

## WOSB and EDWOSB Checklists for First Time Certifications

Print and track your progress towards completion of your certification application

For additional information and links, go to <http://www.uswcc.org/certification>

### Certification Processing Tips:

1. **If you do not have one of the documents listed below** (or if the document does not apply to your firm), please create a simple one-page document stating this. Sign, date and upload this document. By uploading an explainer document, you will save time in the processing.
2. **It is very important that the women owner of the firm sign/submit** the Preliminary Acknowledgements and WOSB or EDWOSB Application. We do not accept submissions from other individuals on behalf of the women owner.
3. **We recommend you read the “Additional Information”** column provided below very closely as this column may contain important information to help you complete the required documents and uploads correctly.
4. **As you begin the upload process, the Certification Team will begin to update your certification portal and list any outstanding documents.** Please login to [womenowned.us](http://womenowned.us), and go to [womenowned.us/mycertification](http://womenowned.us/mycertification). The “My Certification” page is where our certification team communicates with you. Updates to the “My Certification” page are completed manually; they are not automated. Consequently, the notice at the “My Certification” page will not update immediately following your upload of a document. There is typically a delay of 1-2 days as our team intakes all of the incoming documents to assure the documents match our requirements.
5. **If you believe that you have already uploaded a document that is being requested by our certification team, please consider the following:** Often, applicants will upload a document that has not been signed and dated (leases, taxes, board minutes, the Form 413). And, often applicants will fail to upload documents required from all owners, officers and board members. Please look closely at the “Additional Information” column to view the full requirements. All documents must be legible and provided in English.
6. **If you have questions, please use our live chat feature to contact a USWCC Support Team member to help you.** The live chat may be reached by going to either [uswcc.org](http://uswcc.org) or [womenowned.us](http://womenowned.us) and looking at the bottom right side of your browser window for the live chat bubble. Just click on the bubble to begin your chat. If no one is available to assist you at the time of your chat, please note that we will respond directly within the live chat system and you will receive a notice.
7. **How long does the certification process take?** This primarily depends on you – as the USWCC cannot begin the formal exam until you have submitted all documents. Once you have submitted all the required documents, we find the examination process typically takes 30-45 business days.
8. **New business?** New businesses are eligible for certification, as per the federal requirements for the WOSB/EDWOSB program.

Track Date Completed	WOSB Apps	EDWOSB Apps	Action or Item	Additional Information
	WOSB	EDWOSB	Preliminary Acknowledgements: Complete and sign online  This document must be completed and signed by an owner or authorized officer of the firm.	The same document for both WOSB and EDWOSB. <a href="https://public.3.basecamp.com/p/TKTbzeu6Zwz3NYYE XchgsQTm">https://public.3.basecamp.com/p/TKTbzeu6Zwz3NYYE XchgsQTm</a>
	WOSB	EDWOSB	Payment for Services (non-refundable processing fee)	Payment for certification examination services: WOSB – <a href="https://uswcc.org/certification/wosb-certification/">https://uswcc.org/certification/wosb-certification/</a> EDWOSB – <a href="https://uswcc.org/certification/edwosb-certification/">https://uswcc.org/certification/edwosb-certification/</a>
	WOSB		WOSB Application: Complete and sign online  This document must be completed and signed the women owner of the firm	The WOSB has a unique application. <a href="https://app.hellosign.com/s/bedfc307">https://app.hellosign.com/s/bedfc307</a>
		EDWOSB	EDWOSB Application: Complete and sign online  This document must be completed and signed the women owner of the firm.	The EDWOSB has a unique application. <a href="https://app.hellosign.com/s/7cc18e94">https://app.hellosign.com/s/7cc18e94</a>
<p><b>UPLOAD EACH OF THE FOLLOWING REQUIRED DOCUMENTS</b></p> <p>Go to <a href="https://www.womenowned.us/certification-supporting-docs.aspx">https://www.womenowned.us/certification-supporting-docs.aspx</a> to upload your documents. Each document uploaded will be automatically renamed with your UEI #, the required document name and the date submitted. <b>** Please note, we DO NOT accept redacted or password protected documents.**</b></p>				
	WOSB	EDWOSB	<b>Gender/Citizenship:</b> Birth Certificates, Naturalization Papers, or unexpired Passports for owners who are women	Each woman owner must provide one of these. <i>The Picture(s) must be clear.</i>
	WOSB	EDWOSB	<b>For limited liability companies only:</b> (1) Articles of organization (also referred to as certificate of organization or articles of formation), (2) Any amendments (3) All company meeting minutes	Only LLCs need complete this action. All documents must be legible and provided in English.
	WOSB	EDWOSB	<b>For limited liability companies only:</b> Operating or member agreement, and any amendments	Only LLCs need complete this action. All documents must be legible and provided in English. This is a <u>REQUIRED</u> document despite what your filing state requires.

	<b>WOSB</b>	<b>EDWOSB</b>	<b>For corporations only:</b> Articles of incorporation and any amendments;	Only corporations need complete this action. All documents must be legible and provided in English.
	<b>WOSB</b>	<b>EDWOSB</b>	<b>For corporations only:</b> By-Laws and all amendments	Only corporations need complete this action. All documents must be legible and provided in English. This is a <u>REQUIRED</u> document despite what your filing state requires.
	<b>WOSB</b>	<b>EDWOSB</b>	<b>For corporations only:</b> All issued stock certificates, including the <i>front and back copies</i> , signed in accordance with the by-laws	Only corporations need complete this action. All documents must be legible and provided in English.  Note: You must submit the front and back copies of all issued stock certificates (including any certificates that have been voided).
	<b>WOSB</b>	<b>EDWOSB</b>	<b>For corporations only:</b> Stock ledger  A stock ledger is a permanent record of the capital stock of a corporation. At a minimum, a stock ledger should include: name of the stockholder, the date issued, the stock certificate number, the number of shares owned (per the certificate), the date of the transfer, to whom shares were transferred, certificate numbers, number of shares transferred.	Only corporations need complete this action. All documents must be legible and provided in English.
	<b>WOSB</b>	<b>EDWOSB</b>	<b>For corporations only:</b> Shareholder or voting agreements, if any	Only corporations need complete this action. All documents must be legible and provided in English. [If your firm has no by-laws, prepare, date and sign a document making this statement.]
	<b>WOSB</b>	<b>EDWOSB</b>	<b>For corporations only:</b> Board of Director's meeting minutes for <i>all meetings</i> (must include the minutes from all meetings of the corporation including electing the current slate of directors and officers).	Only corporations need complete this action.
	<b>WOSB</b>	<b>EDWOSB</b>	<b>For partnerships only:</b> The partnership agreement and any amendments and all Company meeting minutes. Any buy-out and/or profit sharing agreements.	Only partnerships need complete this action. If there is a general partner, provide the general partnership agreement. This is a <u>REQUIRED</u> document despite what your filing state requires.
	<b>WOSB</b>	<b>EDWOSB</b>	<b>For sole proprietorships only</b> (and corporations, limited liability companies and partnerships, if applicable):	Only sole proprietorships need complete this action.

			Assumed/Fictitious Name Certificate and all Company meeting minutes	
	WOSB	EDWOSB	<b>Federal 941 Quarterly Payroll Tax Returns</b>	Most recent. [If you do not have employees, upload a document stating this.]
	WOSB	EDWOSB	<b>Federal business tax returns</b> with all schedules and statements for the last <b>three</b> tax years	All applicants must provide. If your firm was newer and does not have a full three years of taxes, upload the tax years you do have and upload a document stating that, due to the age of your firm, you only have tax filings for the past “x” years. All taxes must be signed, even if efiled.
	WOSB	EDWOSB	<b>Business Financial Statements:</b> (1) Complete prior year Balance Sheet, P & L; (2) Year to date Balance Sheet, P & L.	Balance Sheet (Detailed) – Prior year and current year to date; P & L (Detailed). Each report must be recent.
	WOSB	EDWOSB	<b>Financial &amp; Mgt History of the Firm:</b> (1) A written financial and management history of your firm including ownership origination and changes, management, cash and equity contributions with dates for each. (2) In addition, to assisting the examiner in understanding the flow of ownership and management of the firm, this document can be used to help explain ownership changes and duties.	This document is a narrative (in your own words) detailing the ownership and financial history of your firm. It is intended to provide the certification team with a thorough understanding of the financial and ownership history of your firm. Include an explanation of the primary business of the firm, dates, activities, owners and ownership changes and important financial activities.
	WOSB	EDWOSB	<b>Resumes for ALL owners:</b> Include education, training, employment and job responsibilities with dates for each. <i>Biographies are not acceptable.</i>	<i>Include specific dates and details of employment, employer, title and job responsibilities.</i> Biographies and informal narratives are not acceptable.
	WOSB	EDWOSB	<b>W-2, 1099 &amp; K-1s</b> for every Officer, Director or Owner <b>FROM ALL SOURCES</b> (three tax years)	W-2’s and 1099’s are required without exception. Every Officer, Director or Owner must provide these from all sources – not just from the Applicant firm.
	WOSB	EDWOSB	<b>Current bank signature card</b>	Photo copy of bank debit/credit card not acceptable.
	WOSB	EDWOSB	<b>Itemized Payroll for all employees with the date of the payroll. Include:</b> employee name, workers compensation class code, hours, earnings, reimbursements and other payments, detailed withholdings, deductions and net pay allocations for the most recent pay period. Include: the date and period of the pay period.	From most recent payroll. [If you do not have employees, upload a document stating this.]
	WOSB	EDWOSB	<b>Signed leases</b> for primary facilities	If homebased, prepare and upload a document stating this and provide the address of the home and the home owner’s name.

	<b>WOSB</b>	<b>EDWOSB</b>	<b>List of all major assets</b>	Include property, office/facilities, equipment, vehicles with value, ownership or lease status noted, and (if leased) the name of the entity from which the equipment was leased.
	<b>WOSB</b>	<b>EDWOSB</b>	<b>Asset Transfers:</b> Documentation of any transfer of assets to or from the firm or between Officers, Directors or Owners within the last two years	For example: A transfer of shares in the applicant firm between a husband and wife with full details of the value, compensation and any related agreements.
	<b>WOSB</b>	<b>EDWOSB</b>	<b>All licenses and/or certifications</b> <u>required</u> for primary business activities of the firm	A photocopy of the license or certificate
	<b>WOSB</b>	<b>EDWOSB</b>	<b>Joint Venture Agreements</b> with any third party.	
	<b>WOSB</b>	<b>EDWOSB</b>	<b>Trust Document(s), complete</b>	If the applicant firm is owned fully or in part by a trust, provide a copy of the trust document.
	<b>WOSB</b>	<b>EDWOSB</b>	<b>Federal Personal Income Tax Returns</b> including all schedules and W-2 forms from <b>ALL OWNERS</b> for the last three tax years. (Do not submit state tax returns.) Taxes must be signed even if they were efiled. A signed IRS 8879 is acceptable in place of the signed return.	Personal taxes should include spouses as well (if filed separately), unless legally separated from spouse.
	<b>WOSB</b>	<b>EDWOSB</b>	<b>Previous women-owned certification denial letters from all sources.</b>	If your firm has previously been denied certification from any government or third-party provider, upload the denial letter(s).
	<b>WOSB</b>	<b>EDWOSB</b>	<b>Debt Instruments</b> for all Liabilities listed on the company's Balance Sheet.	Provide all active loan agreements, note payables, promissory notes, security agreements and surety agreements.
	<b>WOSB</b>	<b>EDWOSB</b>	<b>Agreements:</b> (1) That influence the day-to-day operations, production or distribution of the Applicant business product/service; (2) That establish affiliation or subsidiary relationships; (3) That establish a franchise relationship.	Examples: Management/Consulting Agreements that influence the management and/or operations of the Applicant firm, Service Agreements that influence day-to-day operations, Affiliate and/or Subsidiary Agreements, Franchise Agreements

**FOR EACH WOMAN CLAIMING ECONOMIC DISADVANTAGE**

		<p align="center"><b>EDWOSB</b></p>	<p><b>Personal Financial Disclosures</b></p> <p>(1) The Personal Financial Disclosure document is <b>completed and signed online by all women owners</b> who make up the majority ownership of the firm.</p> <p>(2) Do NOT SPLIT OUT ASSETS on this form between spouses.</p>	<p>Online form with eSignature - <a href="https://app.hellosign.com/s/f643946c">https://app.hellosign.com/s/f643946c</a></p>
		<p align="center"><b>EDWOSB</b></p>	<p><b>Personal Financial Statement (SBA Form 413)</b></p> <p>(1) The SBA Form 413, Personal Financial Statement is different from the Personal Financial Disclosures (above).</p> <p>(2) This form must be completed by all women owners who make up the majority ownership of the firm and their spouses --- separately (not combined).</p> <p>(3) Both the applicant(s) and the spouse(s) must complete this form – separately. The assets shown on the form should be broken out per spouse. Do not aggregate.</p> <p>(4) This document is also used by the SBA for 7(a) / 504 loans and surety bonds.</p> <p>(5) <b>Each form submitted must be signed and dated.</b></p>	<p>Online form with eSignature - <a href="https://form.jotform.com/203193543654052">https://form.jotform.com/203193543654052</a></p>