

# Applying to WOSB/EDWOSB

## What documents & info do I need?

**A Women-Owned Small Business (WOSB) or Economically Disadvantaged Women-Owned Small Business (EDWOSB) application is separated into sections called Cards. Within each Card an applicant will be required to answer questions and upload documentation to demonstrate eligibility for the WOSB Federal Contracting Program (WOSB Program).**

All documents identified below should be saved in PDF format, no larger than 25MB each. Be prepared to upload these documents as you complete the WOSB Program's application. Pre-save the necessary files with the following format: file name\_year (i.e.: TaxDocument\_2020). Do not password protect files.

### SBA Eligibility

- Confirm your size-standard as a [small business](#)
- Be at least 51 percent owned and controlled by one or more women who are U.S. citizens  
Provide any ONE of the following documents for enough firm owners who are U.S. Citizens to demonstrate that the applicant firm is at least 51 percent owned and controlled by United States citizens:
  - Birth Certificate
  - Certificate of Naturalization
  - Unexpired U.S. Passport
  - Consular Report of Birth Abroad of a U.S Citizen (Form FS-240).

## Ownership

### Women Ownership

- Qualifying individual(s) include all women claiming 51 percent ownership.
- Active registration in the System for Award Management for the firm, available at [SAM.gov](https://sam.gov)  
(Note: The firm's UEI, TIN, and bank account number must exactly match SAM registration)
- If the applicant(s) is subject to any conditions, executory agreements, voting trust or other arrangements that cause or potentially cause ownership benefits to go to another person, the applicant should provide the following documents.
  - Copy of the joint venture agreement, if applicable
  - Copy of the written Agreement (an executory agreement, voting trust, or other arrangements), if applicable
- The 51 percent ownership may not be through another business entity or a trust (including employee stock ownership plan) that is, in turn, owned and controlled by one or more women or economically disadvantaged women. However, ownership by a trust, such as a living trust, may be treated as the functional equivalent of ownership by a woman or economically disadvantaged woman where the trust is revocable, and the woman is the grantor, the trustee, and the sole current beneficiary of the trust. If the ownership is not direct and/or 51 percent ownership held by the trust with conditions above, should provide the following documents:
  - Direct Ownership document, if applicable
  - Trust Document, if applicable

### Firm Ownership/Business Structure

- To apply for certification as a WOSB, you need to provide the following documents to Certify in order to demonstrate that the business is at least 51 percent owned and controlled by one or more women:
  - Limited Liability Companies (LLC)**
    - Articles of organization (also referred to as certificate of organization, or articles of formation) and any amendments
    - Operating Agreement and any amendments
    - Joint venture agreement, if applicable
    - Assumed/Fictitious name certificate (doing business as or dba), if applicable
  - Corporations**

- Articles of incorporation and any amendments
- By-laws and any amendments
- All issued stock certificates, including the front and back copies signed in accordance with the by-laws (this also applies to all canceled stock certificates)
- Stock ledger
- Voting agreements, if any
- Joint venture agreement, if applicable
- Assumed/Fictitious name certificate (doing business as or dba), if applicable
- Partnerships**
  - Partnership agreement and any amendments
  - Joint venture agreement, if applicable
  - Assumed/Fictitious name certificate (doing business as or dba), if applicable
- Sole Proprietorships**
  - Assumed/Fictitious name certificate (doing business as or dba), if applicable

**NOTE:** If you are applying to qualify as an EDWOSB, you must provide all of the above documents and the following:

- Three most recent personal income tax returns (including all schedules and W-2's) for each woman claiming economic disadvantage and such woman's spouse (unless they are legally separated);
- Three most recent business income tax returns (including all schedules); and
- IRS Form 4506-T, Request for Tax Transcript for you and your spouse, if married

Additionally, you will be required to supply details on your personal assets and liabilities at [wosb.certify.sba.gov](https://wosb.certify.sba.gov).

## Existing Qualified Certification

- 8(a) Business Development Program Participants must provide the following:
  - Upload most recent annual review letter or;
  - 8(a) acceptance letter, if the firm is in program year 1.

- Third Party Certified (TPC) firms – Firms certified by an SBA approved TPC must upload their certificate into [wosb.Certify.sba.gov](https://wosb.certify.sba.gov) to demonstrate WOSB program eligibility:
  - TPC Certificate as WOSB and/or;
  - TPC Certificate as EDWOSB
- Center for Verification and Evaluation (CVE) certified firms must provide:
  - CVE certification letter

## Economically Disadvantaged Business

Applicants that wish to qualify as an economically disadvantaged business will be required to also complete several questions to represent to SBA the firm's eligibility for the WOSB Program. Each firm owner claiming 51 percent ownership interest must complete an Individual Contributor questionnaire and provide financial data and upload supporting documentation. These qualifications include:

- Meet all the requirements of the WOSB Program;
- Be owned and controlled by one or more women, each with a personal net worth less than \$850,000;
- Be owned and controlled by one or more women, each with \$400,000 or less in adjusted gross income averaged over the previous three years; and
- Be owned and controlled by one or more women, each \$6.5 million or less in personal assets.

## Individual Contributors

Each individual whose claiming 51 percent ownership interest will be used to qualify for WOSB or EDWOSB must complete an individual contributor's questionnaire.

These individuals include:

- One or more women owners that comprise the 51 percent ownership
- A spouse, if married or legally separated (EDWOSB applicants only)
- Board Members, if applicable

The following is needed for each of these individuals:

- First Name
- Last Name
- Email address
- Permission for Collaboration

In addition to the above, each Individual Contributor will have to upload the required documents:

- Proof of U.S citizenship (any of the following options)
  - Birth Certificate
  - Certificate of Naturalization
  - Unexpired U.S. Passport
  - Consular Report of Birth Abroad of a U.S Citizen (Form FS-240).
  
- Resume** – Provide a personal resume with the following:
  - Education
  - Technical training
  - Description of your current duties within the Applicant firm
  - Any other current or past employment experience, including:
    - Employer’s name
    - Dates of employment
    - Job title
    - Description of duties

Be sure to include any outside businesses you own.

- If you have another job outside the Applicant Firm upload an explanation letter outlining the following:
  - Job title
  - Your primary role and responsibilities
  - The average number of hours worked per week
  - Normal weekly work schedule
  
- If you work for another firm that has a relationship with the Applicant Firm.
  - Written statement explaining this relationship
  
- If you are currently employed within the Federal Government.

- A Letter of No Objection from the federal employee's agency
- If any immediate member of your household has employment within the Federal Government
  - A Letter of No Objection from the federal agency employing the family member

EDWOSB applicants will also need to submit the following:

- Personal Financial Information** - Required for each woman claiming economic disadvantage and for each woman's spouse.

Detailed information is needed regarding the value of all assets (including cash on hand and in banks, accounts, and notes receivable, retirement accounts, stocks, bonds, real estate, personal property, life insurance, and any other assets), liabilities (such as loans, mortgages, tax debts, and any other liabilities), and income (including salary, investment income, real estate income, and any other income).

**Note:** EDWOSBs and 8(a) Business Development Program participants will have the same personal net worth threshold. Funds invested in an official retirement account will be excluded from the assessment of an economically disadvantaged individual's personal net worth in both programs

- Retirement account [s]
  - An Account statement document issued within 30days of application submission
- Tax Returns
  - Federal Personal Tax returns from the last three years, including W-2, Schedules and attachments
  - Federal Business Tax returns from the last three years
  - IRS Form 4506T – Request for Tax Transcripts