



To help make sure you understand how to properly complete your application on the first submission we have created this step-by-step guide to help you access funds quickly.

If you are receiving commissions via SSN#:

1. Click **Apply Now** on your Keller Williams PPP informational Page and complete your pre-application form (you should be redirected to Ivy Lender's Coastal Community Bank Platform, if not [click here](#))
2. Select **Click here to upload PPP applications to Coastal**
3. Select **Not an existing customer? Click here to get started**
4. Fill in your First and Last Name under **Company Name**
5. Fill in your home address for **Zip Code**
6. Check **I am not a robot** and select the security answers accordingly
7. Click **Find my company**
8. If the system does not recognize your company, select **Can't Find Your Business?**
9. For the 'Business Information Section' your **Business Name** is your First and Last Name, leave the DBA blank, for the **Tax ID** fill in your SSN#, and for **Business Phone** fill in your mobile phone number
10. For **Business Industry** type in **531210** and the system should autofill (Offices of Real Estate Agents and Brokers)
11. For **Business Address** fill in your home address
12. For **Select PPP Application** drop down to indicate whether this is your First or Second loan
13. For 'Please select your business type' select **Independent Contractor**
14. For 'Type of Tax ID' select **Social Security Number**
15. For 'Date Business Was Established' enter your **Real Estate Start Date located on your Real Estate License**
16. Skip Applicant Size Standard, Annual Revenue, and Are you refinancing an EIDL
17. For 'Average Payroll' take your total on your Schedule C #1 and divide by 12 (please note you can only account for a maximum of \$100,000 per person)
18. For 'Number of Employees' enter 1 if you are just applying for yourself
19. The system should pre-populate your PPP Loan Amount
20. For **Loan Purpose** select 'Yes' for payroll and no for everything else
21. For **Applicant Ownership**, answer '1' and 'No' for **Demographics**, and 100 for **Owner 1**



Ivy Lender

22. Skip to Fill Out Primary Authorized Representative Information
23. For **Upload Organizational Docs** upload your Real Estate License and Voided Check
24. For **Upload Owner Identification Verification** upload your Driver's License
25. For **Upload Payroll Documents** upload your 2019 or 2020 Tax Returns (including Schedule C)