



ERTC Funding Partner Process

Step 1:

- Pre-qualify your client (see link)
- Gather SDR
- Submit SDR package to ERTC Funding

Step 2:

- ERTC Funding issues a contract and invoice (within 48 hours)

Step 3 (upon payment of invoice):

- Client receives an on-boarding call from an ERC specialist (typically within 48 hours)
- If additional documentation is determined to be needed after the on-boarding call (due to aggregation or other file-specific nuances), ERTC Funding will work with the Partner and Client to procure them

Step 4 (if FPSO is applicable):

- Client receives a call from the ERTC Funding's compliance team
- ERTC Funding's attorneys issue a legal memorandum (if approved)

Step 5:

- ERTC Funding uses our proprietary optimization tool to maximize the credit amount
- ERTC Funding amends the clients' 941s forms

Step 6:

- Client signs the 941x forms
- ERTC Funding submits the forms to the IRS
- Client receives a check in the mail from the IRS
- ERTC Funding invoices the client for the contingency fee (to be shared by Partner and ERTC Funding)