

Document Checklist

Everything to gather before you certify, license, insure and get listed.

Print this and work top to bottom. Anything marked required is asked for by at least one of: SBA VetCert, your state licensing board, your insurer, or the Toe the Line Builders directory application.

PROOF OF SERVICE

- ☐ **DD-214, Member Copy 4**
Request free from the National Archives: archives.gov/veterans/military-service-records
- ☐ **VA benefit summary letter (SDVOSB only)**
Download at va.gov/records/download-va-letters — must show the service-connected disability rating.
- ☐ **NGB-22 or points statement (Guard / Reserve)**
Used in place of a DD-214 where no active-duty discharge exists.

BUSINESS FORMATION

- ☐ **Articles of organization or incorporation**
Filed with your Secretary of State.
- ☐ **EIN confirmation letter (CP-575)**
Free from irs.gov — never pay a third party for one.
- ☐ **Operating agreement or bylaws**
Must show veteran ownership of at least 51% and day-to-day control.
- ☐ **Business bank account in the company name**
- ☐ **SAM.gov Unique Entity ID (federal work only)**

LICENSING

- ☐ **State contractor license: number, state, class, expiry**
- ☐ **NASCLA accredited exam certificate, if you hold one**
Portable across roughly 15 states — saves retaking the trade exam.
- ☐ **Local / municipal permits or registrations**
- ☐ **Trade certifications (EPA 608, OSHA 10/30, master or journeyman card)**

INSURANCE AND BONDING

- ☐ **Certificate of insurance — general liability**
\$1M per occurrence is the common residential ask.
- ☐ **Workers' compensation certificate, once you hire**
- ☐ **Commercial auto policy for company vehicles**
- ☐ **Surety bond certificate, where your state or city requires one**

FOR YOUR PUBLIC DIRECTORY PROFILE

- ☐ **Business logo and a photo of you or your crew**

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- ☐ **6–10 photos of completed work, before and after where possible**
- ☐ **Service ZIP code and travel radius in miles**
- ☐ **Trade plus the specific services you want to be found for**
- ☐ **Background check result, if you work in occupied homes**