

PRE BUSINESS OFFICE CHECK LIST

CLIENT NAME _____

STOCK # _____

CLIENT INFO

LOAN APPLICATION

- ___ ADDRESS WITH COUNTY (NO P.O BOXES)
- ___ PREVIOUS ADDRESS IF LESS THAN 4 YEARS AT CURRENT
- ___ EMPLOYER - ALL INFO
- ___ PREVIOUS EMPLOYER IF LESS THAN 4 YEARS AT CURRENT
- ___ PRIVACY STATEMENT

PURCHASE AGREEMENT

VEHICLE INFO

- ___ STOCK NUMBER
- ___ VIN TAKEN OFF CAR
- ___ OPTIONS (INCLUDE MANUAL OR AUTOMATIC & DEALER OPTIONS)
- ___ MILEAGE READING (FROM VEHICLE - DAY OF TRADE)
- ___ PERSONAL SETTINGS WORKSHEET w/ CUSTOMER SIGNATURE – NEW
- ___ ACCESSORY CHECKLIST, IF NEW
- ___ CERTIFIED PAPERWORK, IF APPLICABLE
- ___ STOP DISCLOSURE (USED CAR DISCLOSURE)
- ___ SIGNED VEHICLE HISTORY IF USED
- ___ WE OWE
- ___ FOLLOW UP FORM
- ___ BUYER BEWARE – WHOLESALE TO PUBLIC VEHICLES

TRADE APPRAISAL

- ___ YEAR, MAKE, MODEL, CYLINDERS, COLOR & TRANSMISSION
- ___ VIN FROM TRADE
- ___ MILEAGE FROM TRADE
- ___ PAYOFF VERIFICATION FORM COMPLETED
- ___ TITLE, IF TRADING

INSURANCE INFO

- ___ COMPANY & AGENT
- ___ POLICY NUMBER & EFFECTIVE DATES
- ___ ADDRESS & PHONE NUMBER OF AGENT
- ___ PROPER COVERAGE VERIFIED (FINANCE DEALS MUST HAVE COLLISION INS.)
- ___ COPY OF REGISTRATION (VERIFY REGISTRATION IS IN NAME OF MEW PURCHASER & THAT REGISTRATION CAR HAS NOT EXPIRED)
- ___ COPY OF DRIVERS LICENSE
- ___ COPY OF INSURANCE CARD

___ ***CERTIFIED FUNDS OR CASH***

X _____
Sales Consultant

X _____
Sales Manager

I HAVE RECEIVED AND PROVIDED ALL THE INFORMATION ABOVE, AND REALIZE THAT IF NOT PROVIDED MY DELIVERY MAY BE DELAYED BY THE BUSINESS OFFICE.

REASONS FOR INFORMATION NOT PROVIDED:

