**N E W C A R D E A L E R / U S E D C A R D E A L E R**

**Basic Fact - Finder**

* Full Legal Name of business \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***ALL NAMES***
* DBA \_\_\_(IF ANY ) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Effective DATE\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* TAX ID # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*\*\*\* **List of Franchises:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

***Used car dealer – Please indicate here*** X\_\_\_\_\_\_\_\_\_\_

* LIST / Full name of Owners and Partners \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Year Business Started \_\_\_\_\_\_\_\_\_\_\_\_\_

Number of locations \_\_\_\_\_\_\_\_\_\_

List of Locations (ALSO other states) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**\*\*\*\* NEW CAR INVENTORY HELD FOR SALE** – Limit by Location: \_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_\_,\_\_\_\_\_\_\_\_\_\_,\_\_\_\_\_\_\_\_\_\_\_\_\_**Dealership Y or N**

* **USED CAR INVENTORY HELD FOR SALE** **– LIMIT** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Does the prospect have a (new car) floor plan? **Dealer APPLICABLE only**

Does the floor plan cover the insurance for the new car inventory? **Y or N**

* **Customer Car Limit \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ( Need Signed REPAIR ORDER )**
* **In auto service or dealer “Care, Custody and Control”**
* ( GKLL / Legal Liability or Direct Primary )
* Total Number of employees \_\_\_\_\_\_\_\_\_\_\_\_ **( *separated by job description – if new car dealer ) - NEXT PAGE***
* ***\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***
* **Total annual receipts \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Total annual payroll \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* Number of ***Dealer Plates*** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Plate Numbers**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Number of ***Transporter Plates*** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Plate Numbers**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Copies of registrations – Essential – must have**
* Loss Runs NEEDED \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 3 years – **Prefer 5 years**
* **INCLUDED Y or N**

**ASK SPECIFIC QUESTIONS ON “Vehicle Ownership ”**

**\*\*Many dealers and garage owners drive a company owned vehicle**

**Essential for proper coverage and to avoid a lapse in coverage**

**Number of Owned and or LISTED vehicles -**  See below

**Does the Dealer Principal own a car in his/her personal name ?** \_\_\_\_\_ **( Y or N )**

***Personally Individually OWNED*** - **how many, brand, type etc. ?** \_\_\_\_\_\_\_\_\_\_

***Business ownership*** - **Titled and Registered in the Dealership name** ? \_\_\_\_\_\_\_\_\_\_\_

**Scheduled vehicles** - **LISTED/scheduled on the Policy** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**DEMOS \_\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_, **Cars in the NEW Car Inventory – Used by salesmen and/or the principal – COMMON QUESTION AND CONCERN**

* ***DRIVER LIST - Driver License # and DOB***
* ***CURRENT CARRIER \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***
* ***Copy of the current policy***
* ***CURRENT PREMIUM \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***
* ***EXPECTED Premium to win account $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***