

**CUSTOMER INTERVIEW SHEET**

**TIME STAMP:** \_\_\_\_\_

1. "How do you want your name to appear on the Title?" Do you want the primary driver listed first?

Buyer # 1: \_\_\_\_\_ Buyer #2: \_\_\_\_\_

2. "We have your address listed as...is that the address you would like it titled?" Yes \_\_\_ No \_\_\_
3. "These are the figures we have agreed to...(state those figures) "Agreed?" \_\_\_\_\_
4. "You're trading in a", (state the year, make, model). "Do you owe and money on your trade?"  
**IF YES** "How much?" \$ \_\_\_\_\_ "Who will the payoff go to": \_\_\_\_\_
5. "Are there any items that you purchased on this last vehicle that I could possibly assist you in getting a refund on, (VSC, GAP, etc.)?" \_\_\_\_\_
6. "Your vehicle comes with a Manufacturer's limited warranty of" \_\_\_\_\_

"This Limited Warranty covers defects in Material and Workmanship. There is no coverage for items such as oil change, wiper blades and batteries. Those items are considered to be, normal wear and tear, and as such are regularly scheduled maintenance items. Of course, maintenance helps keep your (state new vehicle) as close to fresh and new as it is today. There is also no coverage for tires and wheels if damaged by any kind of road hazard. Your windshield also isn't covered, (depending on state?), if it is damaged by rocks and other debris. Environmental damage to paint, such as tree sap, bird waste, insects and acid rain also isn't covered. Physical damage is covered by your regular auto insurance company, which I see is, \_\_\_\_\_."

"One thing that they cover, (Auto Insurance), but because your deductible doesn't make it cost-effective, are small dents and dings, which also isn't covered under your manufacturer's warranty". "Were you aware of that" Yes \_\_\_ No \_\_\_

7. "How many miles per year do you plan on driving this vehicle?" \_\_\_\_\_ Miles
8. "How long do you usually keep vehicles for?" \_\_\_\_\_ Years  
 If Business, "What type of use, (normal driving, delivery, livery, etc.)?" \_\_\_\_\_
9. "Will you be servicing your vehicle with us?" Yes \_\_\_ No \_\_\_  
**IF NOT** "Would you consider servicing with us if it was cost effective?" Yes \_\_\_ No \_\_\_
10. "Many of our customers finance their vehicles over an extended timeframe, are you as well?"  
**IF YES** "Have you already arranged Financing?" Yes \_\_\_ No \_\_\_

**Review of Credit Application:**

"Your Employer is": \_\_\_\_\_ "Annual Income": \_\_\_\_\_ "Is that gross or after taxes"

- A. "Does that include any additional bonuses or additional income you may have?" \_\_\_\_\_
- B. "Do you expect any raises or advancements in the near future?" Yes \_\_\_ No \_\_\_  
**IF YES** "What is the amount?" \_\_\_\_\_ When \_\_\_\_\_ Is it definite? \_\_\_\_\_ (*Initial please*)
- C. "Some lenders require cash down, and some don't depending on many variables, (credit, term, etc.). If I could save you a significant amount of money, not just on the monthly payment, but also over the life of the loan, would you be able to come up with any additional money down?"
- D. "If your car were stolen, and or a total loss, and the insurance didn't completely pay off your loan, how would you pay the remaining balance?"

"Now, to save you time, and hopefully money, I am going back to my office, and I am going to finish loading all of your information. I will prepare a custom menu for you to review. After reviewing what products best protect you and your new vehicle, I will print your final state, and local paperwork. If you could kindly give me about seven minutes, then I'll come back and get you. In the meantime, would you like something to drink, like a cold beverage, or some coffee?"