DEALER LEADERSHIP

Ready for Finance?

One deal. A clear handoff. Fewer surprises for the customer.

DEAL / STOCK REF. ____________________ **DATE / TIME** ____________________ **PREPARED BY** ____________________

Check what is ready under your store's process. Mark Needs work when something is missing or unverified, then assign the next step below. Use N/A only when it does not apply.

CHECK BEFORE THE NEXT STEP	Ready	Needs work	N/A
Agreed deal Vehicle, price, fees, trade allowance and promised items are documented.	☐	☐	☐
Customer expectations Payment / purchase terms discussed are recorded; pending items are clear.	☐	☐	☐
Trade / payoff, if applicable Current payoff source, valid-through date and title status are checked.	☐	☐	☐
Required documents ID, application / authorization and insurance status checked as applicable.	☐	☐	☐
Open lender conditions Known conditions and missing items are listed using the actual lender notes.	☐	☐	☐
Promises and coverage We-owe items and relevant factory / CPO / product documents are available.	☐	☐	☐
Customer handoff Customer questions, timing needs and the next person / step are explained.	☐	☐	☐

WHAT STILL NEEDS WORK?

Missing item / next action	Owner	Check back

HANDED TO / TIME ____________________

Same person handles sales and finance? Use this as a pause-and-check sheet before switching tasks.

Keep this sheet with the deal record. Use a deal reference, not customer financial details. Follow your store and lender requirements; this checklist is not credit approval or permission to deliver.