

Dealership Questionnaire

Borrower Information:

Guarantor: _____

FICO: _____

Email: _____

DOB: _____

Ownership & Business Information

What is the legal name of the dealership? _____

What is the dealership's business structure? _____

Who are the principal owners and their ownership percentages? _____

How long has the dealership been in operation? _____

Is the dealership franchise or independent? _____

How many rooftops/locations are currently operated? _____

Do you have any affiliated businesses? *(service centers, body shops, related ventures)* No Yes

Are there any liens or encumbrances on the property or assets? No Yes

Provide details of inventory financing or floor plan arrangements. _____

Management & Operations

What is the dealership's staffing structure? *(sales, service, admin)* _____

What is the dealership's customer base? *(local, regional, national)* _____

What technology systems are used for sales, inventory, and accounting? _____

What is the dealership's marketing strategy? *(digital, local advertising, partnerships)* _____

What competitive advantages set your dealership apart in the market? _____

Compliance & Insurance

Does the dealership hold all required licenses and permits? _____

Is the dealership compliant with franchise agreements? *(if applicable)* _____

What types of insurance coverage are in place? *(property, liability, inventory)* _____

Are there any pending legal issues, disputes, or regulatory concerns? _____

Future Plans

What are your short-term growth goals? *(next 12 months)* _____

What are your long-term expansion plans? *(next 3-5 years)* _____

How will the requested financing help achieve these goals? _____

Do you anticipate additional capital needs in the future? _____