

## Franchise Dealer Qualification Checklist

A complete dealer file, including this Dealer Qualification Checklist, must be sent for approval prior to purchasing contracts from a prospective dealer.

Dealer Name	Dealer Number	RBC Name	RBC Number
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Right Side of Folder	Business Development	Operations Manager	BSS Representative	Comments
Completed Dealer Qualification Checklist (this form)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Completed <a href="#">Franchise Dealer Profile (OF-149)</a> Original form with signatures and dates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Signed <a href="#">Agreement for Entitlement to Refund (OF-180)</a> form (California dealers only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Completed <a href="#">Dealer Agreement (OF-24)</a> - there are state specific Dealer Agreement forms for California, Indiana, and Minnesota ( <a href="#">OF/CA-21</a> , <a href="#">OF/IN-09</a> , <a href="#">OF/MN-03</a> ) - signed and dated by all parties and authorized signer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Articles of Incorporation and DBA proof (if applicable) - please see <a href="#">Documentation for Franchise Dealers</a> for acceptable documentation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**Commercial Flooring Relationship with WFDS**  Yes  No

Left Side of Folder	Business Development	Operations Manager	BSS Representative	Comments
Completed <a href="#">Dealer Information Sheet (OF-30)</a> - signed by all parties. The dealer name shown on this document is the name that is entered in CRS. It should match the Dealer Agreement and the contracts for funding purposes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Completed <a href="#">Express Fund Agreement (OF-99)</a> - signed by all parties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Deposit slip or a voided check (or a copy) with dealer's name imprinted. If the deposit slip or voided check is not available, a signed letter from the bank or dealership with the account information is acceptable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Banking License (Arizona, Florida, Michigan, Pennsylvania, and Texas only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<a href="#">Michigan Tax Refund Form (OF-482)</a> - Michigan only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**WRITE UP** (if SVP/Division Manager Signature required)

Empty box for Write Up content.

**ADDITIONAL NOTES OR STIPS** (by SVP/Division Manager)

Empty box for Additional Notes or Stips content.

**APPROVALS** (all items listed above are in the file and in the correct order)

\_\_\_\_\_  
Operations Manager Signature

\_\_\_\_\_  
RBC Manager or Business Development Manager Signature

\_\_\_\_\_  
SVP/Division Manager Signature