



FreedomRoad
Financial *GET OUT
AND RIDE®*

FUNDING CHECKLIST

(Revised 9.1.2021)

When submitting a Promissory Note, Disclosure and Security Agreement (Contract) for processing please refer to this dealer checklist and include all required documentation. Errors or omissions will result in the Contract being pended and will delay funding.

1 Credit Approval

Important: Approval is applicant, asset, and amount financed specific; a change in any of the information will require credit review and will delay funding.

- Credit Approval

2 Credit Application

Important: Must be a FreedomRoad Financial credit application.

- Applicant's Signature
 Co-Borrower's Signature (if applicable)
 If two borrowers, Joint Intent section checked and initialed

3 Promissory Note, Disclosure and Security Agreement (Contract)

Important: Prior approval from FreedomRoad Financial is required before submitting for funding. Discrepancies between the contract and the approval will delay funding.

- Name(s) and address of borrower(s) listed at the top of the Contract
 Description of Motor Vehicle Purchased section filled in completely and accurately
 Federal Truth-In-Lending Disclosure section filled in completely and accurately
 Payment Schedule section filled in completely and accurately
 Itemization of Amount Financed section completed accurately
 Optional Credit Insurance section must be completed if credit insurance is being financed in the contract
 Optional Guaranteed Auto Protection (GAP) section must be completed if the customer is financing GAP coverage
 Interest rate (APR) on the contract stated again under the Promise to Pay disclosure
 Borrower's signature
 Co-Borrower's signature (if applicable)
 Contract Date

4 Bill of Sale

- Copy of itemized Bill of Sale/Sales Receipt

5 Driver's License

Important: A copy of a valid driver's license is required from all borrowers for consumer identity purposes. We will not fund a contract without that information.

- Copy of Borrower's license
 Copy of Co-Borrower's license (if applicable)
 Driver's License should match the contract address (if addresses do not match, further identifying information may be required)

6 Title Paperwork

Important: Contracts will be pended if copies of the following are not included. MSO, title, title application, guarantee of lien holder letter, UCC-1 or other state document that specifies:

- Borrower's name and address
 Asset information
 "FreedomRoad Financial" listed as the lien holder. Lien holder address is: P.O. Box 18218, Reno, NV 89511
*For New Jersey residents, list "Evergreen Bank Group." Lien holder address is:
1515 W. 22nd St., Suite 100W
Oak Brook, IL 60523
FRF Corp Code for NJ is 319074415605230

7 Insurance Information

Important: All contracts on street legal vehicles over \$5,000 amount financed require full coverage insurance on the vehicle.

- Copy of customer's insurance policy or binder showing 'FreedomRoad Financial' as loss-payee, or completed and signed copy of FreedomRoad Financial's Agreement to Provide Insurance document
Please note: an insurance binder is required for street legal vehicles on loan amounts of \$25,000 and greater

8 Supporting Documents and Information -(when applicable)

- References – name, city, state, and phone number
 Cell phone number or alternate number
 Extended Service Plan contract
 GAP Protection documentation
 Pre-paid Maintenance Plan documentation
 Tire and Wheel Plan documentation

Contract Packages may be uploaded in DecisionLender, faxed, or mailed to FreedomRoad Financial.

