

POSITIVE EQUITY QUOTE FORM

UK garage / dealer customer quotation and pre-order record template

Important: This template is a general business document for recording vehicle quotations, customer options, finance discussions, pricing decisions, deposits, extras and pre-order evidence. It is not legal, tax, accounting or financial advice. Have it checked by a qualified adviser for your exact business, finance permissions, consumer process and jurisdiction before relying on it.

| | | |
|--------------------------------|-------------------|---------------|
| Form reference / quote number: | Date: | Staff member: |
| Vehicle registration: | Customer / buyer: | Salesperson: |

Purpose

Used when the customer's part-exchange is worth more than the finance settlement.

Details to Record

| | |
|-----------------------------|-------------------------------------|
| Customer name: | Part-exchange vehicle registration: |
| Agreed part-exchange value: | Finance settlement figure: |
| Positive equity amount: | Equity used as deposit: |
| Equity paid to customer: | Equity deducted from balance: |
| Final quote amount: | Customer acknowledgement: |

Notes / Supporting Evidence

Notes, supporting evidence, customer communications, quote references or follow-up action:

Signatures / Acceptance

| | |
|------------------------------|--|
| Customer signature: _____ | Salesperson / garage signature: _____ |
| Date: _____ | Time / reference: _____ |