

# FINANCE QUOTATION 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 giving the customer an example finance quote.

## Details to Record

Customer full name:	Vehicle registration:
Vehicle price:	Deposit amount:
Part-exchange allowance:	Amount of credit:
Finance product type:	HP:
PCP:	Conditional sale:
Term length:	Monthly payment:
APR:	Total amount payable:
Optional final payment, if PCP:	Annual mileage limit, if PCP:
Finance provider name:	Quote expiry date:
Subject to status wording:	Customer acknowledgement:

## Notes / Supporting Evidence

**Compliance / guidance note:** The FCA Handbook includes pre-contractual requirements for regulated credit agreements, and motor dealers acting as credit brokers need to follow consumer credit rules where applicable.

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

## Signatures / Acceptance

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