

The **No-Surprises** Vehicle Purchase Checklist

A quick guide to help you stay comfortable, confident, and informed during your car-buying journey.

Salesperson: _____

Today's Date: _____

Store: _____

Your Complete Purchase Journey

01

Vehicle Short-List & Availability Check

What this means: Find vehicles that match needs & availability.

Ask or confirm:

- "Must-have" and "nice-to-have" features or options?
- Is the vehicle available now, or in transit?
- Can I see the vehicle history, options, packages, and pricing?

02

Vehicle Test-Drive Process

What this means: Experience the vehicle to confirm needs are met.

Ask or confirm:

- Have I driven or viewed all vehicles on my short-list?
- Did we explore safety features, connectivity, cargo space, and seat comfort?
- Do I feel confident this vehicle fits my lifestyle?

03

Budget & Pre-Approval

What this means: Confirm budget and financing options upfront.

Ask or confirm:

- Ideal monthly payment and total budget range?
- Would I like to finish financing pre-approval today or online?
- Do I understand estimated expenses (payment, taxes, fees, insurance, extras)?

04

Trade-In Estimate & Payoff Review

What this means: Get your trade value and payoff details.

Ask or confirm:

- What market data was used to get my trade-in value?
- Do I fully understand how my payoff affects equity or negative equity?
- Have I reviewed my trade-in estimate on paper or digitally?

05

F&I Menu & Transparent Options

What this means: Review F&I options with clear pricing upfront.

Ask or confirm:

- Can I see a printed or digital menu with all pricing and coverage details?
- Which protection plans fit my driving habits and ownership?
- Am I aware that all add-ons are optional and priced individually?

06

Online, In-Store, or Hybrid Paperwork

What this means: Complete paperwork and payment.

Ask or confirm:

- Which steps can be finished online to save time?
- Do I know how long today's paperwork will take?
- What documents do I need to finalize (ID, insurance, payment, etc.)?

Your Complete Purchase Journey

07

Delivery Expectations & Post-Sale Support

What this means: Understand when and how your vehicle will be delivered and how to get help later.

Ask or confirm:

- When and how will accessories, delivery, and detailing be completed?
- Will I receive a review of features (Bluetooth, safety tech, apps, etc.)?
- Who do I contact for service, questions, or warranty help?

Customer Notes

Customer Acknowledgment

I received this checklist to support a transparent buying experience.

Customer Signature: _____

Salesperson Signature: _____

Date: _____