

Good Shepherd Fund

A SECURED ALLIANCE AFFILIATE

TO SUBMIT THIS FORM

FAX: 215-358-2291

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VEHICLE PURCHASE APPLICATION

BENEFICIARY NAME (PLEASE PRINT) _____

Address _____

Home Phone _____ Cell Phone _____

Work Phone _____ Email _____

ALL vehicle purchases must be approved by the Special Considerations Committee.

Please initial each line indicating your understanding and/or completion:

_____ Do you already own a vehicle? Yes No

Has the Trust previously purchased a vehicle for you? Yes No

→ If yes, that vehicle may need to be sold or traded in if a new vehicle purchase is approved.

_____ Send a signed copy of this APPLICATION to Good Shepherd Fund.

→ Any vehicle purchase application's approval is subject to the governing document, the beneficiary's unique needs/wants, fiduciary prudence, and applicable state and local laws.

_____ All vehicle purchases are subject to the approval of the Special Considerations Committee.

→ We do not approve the purchases of luxury vehicles. A beneficiary should not take possession of a vehicle until it has been approved and paid for by the Trust, **therefore do not sign any paperwork prior to approval.**

_____ Provide a copy of your valid driver's license.

→ A beneficiary must have a license in order to buy a vehicle. A vehicle purchase **may** be approved for a disabled minor or adult beneficiary for whom regular transportation is provided by a parent or another adult with whom he/she lives.

_____ A lien must be placed on the title of the vehicle.

→ The lien must be in favor of Good Shepherd Fund FBO (beneficiary) for the amount paid by the Trust.

_____ Third party vehicle purchase fees.

→ Third party vendor fees associated with research and fulfillment of vehicle purchases are passed through to the individual's trust account.

_____ Will this vehicle be driven while working for Uber, Lyft or other Rideshare Service?

→ _____ Yes

→ _____ No

_____ Have you had any at-fault accidents in the past three (3) years?

→ _____ Yes (Please explain on separate sheet of paper)

→ _____ No

_____ Vehicle Insurance Requirement.

→ Every trust-purchased vehicle is required to have and maintain full comprehensive insurance coverage as defined by the beneficiary's state of residence.

_____ You must comply with state regulations to keep your vehicle registered and inspected yearly and forward proof of the same to the administrative offices.

APPLICANT NAME (PLEASE PRINT) _____

Relationship of Applicant to Beneficiary _____

Who will be driving the vehicle? _____

License State _____ **License Number** _____ *Please attach a copy of the driver's license.*

REASON FOR PURCHASE APPLICATION

Tell us what we should consider when reviewing this application; what are present circumstances that indicate the trust should pay for the purchase of a vehicle; how will the vehicle purchase benefit the beneficiary.

MODIFICATIONS FOR ACCESSIBILITY – *Tell us what modifications are needed for accessibility.*

ACKNOWLEDGEMENTS

Please initial each line indicating your understanding:

_____ I understand that Good Shepherd Fund may, in its discretion, obtain a copy of my driving record for consideration of this application. I hereby give consent for Good Shepherd Fund to submit a request for DMV records on my behalf, and to use funds from the beneficiary's trust share to pay the cost of obtaining these records.

_____ I understand that if the vehicle is approved for purchase, the following is also required:
→ CARFAX Vehicle History Report for all pre-owned vehicles
→ Bill of Sale listing Good Shepherd Fund as lienholder
→ Title Application listing Good Shepherd Fund as lienholder

_____ I understand that the third-party vehicle purchase fee will be paid from the trust account.

_____ I understand it is my responsibility to maintain full comprehensive insurance on my vehicle.

_____ I have reviewed and understand all the steps in the vehicle purchase process and agree to complete all necessary steps before purchasing a vehicle.

Signature of Applicant _____
Date _____

Please allow 5-8 business days for processing.