

Good Shepherd Fund

A SECURED ALLIANCE AFFILIATE

TO SUBMIT THIS FORM

FAX: 215-358-2291

EMAIL: email@GoodShepherdFund.org

MAIL: 10439 S 51st St. STE 225, Phoenix, AZ 85044

PHONE: 833-403-1198

VEHICLE PURCHASE APPLICATION

BENEFICIARY NAME (PLEASE PRINT): _____

ADDRESS: _____

HOME PHONE: _____ CELL PHONE: _____

WORK PHONE: _____ EMAIL: _____

ALL VEHICLE PURCHASES MUST BE APPROVED BY THE TRUST ADVISORY COMMITTEE.

PLEASE INITIAL EACH LINE INDICATING YOUR UNDERSTANDING AND/OR COMPLETION:

_____ Do you or your spouse already own a vehicle (if applicable)? 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.

→ Once your application has been reviewed, the Assets Department will set a budget and send an approval email. It is recommended not to shop for a vehicle until this amount has been determined. Under no circumstances should you take possession of a vehicle prior to final trust approval and payment.

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

→ A beneficiary must have a license to purchase a vehicle through their trust account. 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.

→ If at any time the license of a named driver is suspended, you agree to notify the Trust immediately upon suspension.

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

→ The lien must be in favor of Good Shepherd Fund FBO (beneficiary).

_____ Third party vehicle purchase fees (if applicable).

→ 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 five (5) years?

**If yes, please explain on a separate sheet of paper.*

Yes 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. I agree to submit renewal bills immediately upon receipt to the trust. Where applicable, I will designate the trust as the mailing address for renewal bills. **Only drivers listed on the insurance are permitted to drive the vehicle.**

I confirm I will comply with state regulations to keep the vehicle registered and inspected yearly (or per state requirements) and forward proof of the same to vehicles@securedalliance.org.

Vehicles purchased through a minor's account in the name of a parent **do NOT** belong to the parent and upon age or majority or account closing, unless otherwise agreed, parent/guardian agrees to a transfer of ownership.

PLEASE ALLOW 5-8 BUSINESS DAYS FOR PROCESSING. INCOMPLETE FORMS WILL BE RETURNED.

FORMS ARE AVAILABLE ON OUR WEBSITE IN THE RESOURCE LIBRARY.

GOODSHEPHERDFUND.ORG

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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 about your current commute method and what should be considered 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. Use an additional page if necessary.

MODIFICATIONS FOR ACCESSIBILITY *Please describe what modifications are needed for accessibility.*

ACKNOWLEDGEMENT

Please initial each line indicating your understanding:

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

**If the driver is other than trust beneficiary, they are to sign here indicating their consent for their driving record to be obtained by the trust.*

X _____ Date: _____

_____ 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 (if applicable).

_____ I acknowledge my account will be charged \$50 to overnight payment for the vehicle.

_____ 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: _____

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