Lee & Mason Financial Services, Inc.

Creditor-Placed Insurance (CPI)

Proposal Request/Application

Financial Institution			
Address			
City/State/Zip		Fax	( )
Contact/Title		Phone	( ) ext.

PORTFOLIO STATUS

	#	$ outstanding	monthly volume #	max. term	avg. term	max.$ amount
auto direct						
auto indirect						
rec. vehicle						
boat/marine						
mobile home						
other						

	auto direct	auto indirect	RV	boat	mobile home	other
# loans made last year						
loans made prior year						
# repossessions YTD						
repos last year						
repos prior year						
# unrecovered skips YTD						
skips last year						
skips prior year						
net charge-offs $ YTD						
charge-offs last year						
delinquency % (30 day)						
delinquency last year						

Collections Manager _____ Phone ( )

LOAN UNDERWRITING

Down payment: _____% new auto; _____% used auto. Maximum debt/income ratio _____%.

Do you use a credit scoring system? ☐ Yes ☐ No If yes, what kind? _____

Are dealers set up under full/partial recourse? ☐Yes ☐ No Repurchase? ☐ Yes ☐ No

INSURANCE INFORMATION

Do you verify insurance coverage before a loan is granted? ☐ Yes ☐ No

Do you follow-up on the insurance status of each loan? ☐ Yes ☐ No

If yes, do you use an automated tracking service? Name _____

Do you intend to continue follow-up/tracking of insurance? ☐ Yes ☐ No

Do you use LSI (or VSI/blanket) to protect your auto loans? ☐ Yes ☐ No

Agency: _____ Company: _____ Policy Date: _____/_____/_____

Premium per: $_____ auto direct $_____ indirect $_____RV $_____boat $_____ mobile home

Deductible: $ _____. Limits $ _____. Are skip losses covered? ☐ Yes ☐ No

Canceled/non-renewed: ____/____/_____. Will coverage continue on portfolio? ☐ Yes ☐ No

Signing this application does not bind the applicant nor the Company/Underwriters to complete this insurance.

All of the information provided is accurate to the best of my knowledge and I understand that the policy, if issued, will be based upon the information provided herein.

_____ _____ _____ _____

authorized signature date printed name title

Toll Free: 800-533-9469 / Email: marketing@leeandmason.com / Fax: 518-863-9118