

D-Plan Eligibility Requirements

Program Description

- New vehicle purchase program for selected Ford, Ford Lincoln and Lincoln dealership employees and certain eligible family members.

Who's Eligible

- All Ford, Ford Lincoln and Lincoln dealerships that meet the qualifications of the D-Plan Privileges Program will be eligible to offer D-Plan to employees.
 - Dealership employees must be listed in STARS3.
 - Two new products per calendar year may be purchased/leased.
 - The following family members are eligible to participate:
 - **spouse**
 - **parents**
 - **spouse's parents**
 - **Grandparents**
 - **Spouse's grandparents**
 - **sons and daughters (including in-laws and step-children)**
 - **grandchildren**
 - **brothers and sisters (including in-laws, half and step)**
 - **same-sex domestic partners of eligible active employees. ***
 - **immediate family members of eligible same-sex domestic partners. ***
- (* For further details, see the eligibility rules posted at www.dplan.dealerconnection.com)*
- Cross-buying/leasing is allowed. For example, an employee of a Ford dealership may obtain a Lincoln product and vice versa.
 - Vehicles should be purchased/leased from the sponsoring employee's dealership. However, if this is not practical, eligible relatives may purchase/lease their vehicle from any participating Ford, Ford Lincoln or Lincoln Dealership.

Documentation and Retention

- **A copy of the AXZD-Plans Pricing Agreement should be kept at the dealership to support claims in the event of an audit. Refer to the Forms/Guide section of the AXZD Dealer Website for the AXZD-Plans Pricing Agreement.**
- **All commission claims are subject to future audit and possible charge back to the dealership.**
- **For D-Plan, the dealership will be required to provide a copy of proof of the customer's relationship to an eligible dealership employee and sufficient proof of dealership employment (i.e. paystub) from the eligible dealership employee. This is in addition to identifying the sale as "Dealership Employee (D-Plan Only)" and list the eligible D-Plan Privilege Program Dealership on the New Vehicle Purchase Plan/Lease Option Customer/Dealer Agreement and Pricing Sheet.**
- **Participating Dealerships agree to make available such dealership records to the extent considered necessary by Ford Motor Company for audit of the transactions claimed under the New Vehicle Purchase Plan. Dealers must retain for at least two years all records and documents, including journals and ledgers, which relate in any way, in all or in part, to covered transactions.**
- **The D-Plan Eligibility Checklist is provided to assist the dealer in collecting and recording appropriate proof of relationship documents. It is highly recommended that this document be completed and retained to support claims in the event of an audit. Additionally, the selling dealer who is not the employing dealer for the D-Plan sponsor in question is encouraged to request and file a copy of the completed D-Plan Eligibility Checklist. Retaining this document will help ensure relationship rules under D-Plan have been followed, assist auditors with validating claims in the event of an audit and help protect dealers from potential charge backs.**

Prior to completing a D-Plan transaction, proof of eligibility must be established. This form is provided to dealers to assist in identifying and collecting the proper relationship documents to successfully support D-Plan claims in the event of an audit.

D-Plan Eligibility Requirements

EMPLOYEE NAME _____

EMPLOYEE'S DEALERSHIP _____

CUSTOMER NAME _____

RELATIONSHIP _____

Eligible relatives and documents required:

Self	_____	Verify dealership has retained appropriate payroll records to validate employment on date of PIN generation.
Spouse	_____	Marriage license
Parents	_____	Birth certificate or adoption records of employee
	_____	Marriage licenses if names are different or have changed
Spouse's Parents	_____	Marriage license
	_____	Birth certificate or adoption records of employee's spouse
	_____	Marriage licenses if names are different or have changed
Grandparents	_____	Birth certificate or adoption records of employee
	_____	Marriage licenses if names are different or have changed
Spouses Grandparents	_____	Marriage license
	_____	Birth certificate or adoption records of employee's spouse
	_____	Marriage licenses if names are different or have changed
Sons & Daughters (Including in-law & step)	_____	Birth certificate or adoption records
	_____	Marriage licenses if names are different or have changed
	_____	Marriage licenses for step & in law if names are different
Brothers & Sisters (Including in-law & step)	_____	Birth certificates or adoption records of employee & sibling
	_____	Marriage licenses if names are different or have changed
	_____	Birth certificate of sibling & marriage license if in-law
Grandchildren	_____	Birth certificate or adoption records of employee's child
	_____	Birth certificate or adoption records of grandchild
	_____	Marriage licenses if names are different or have changed

No other family members are eligible.

PIN: _____ Employee Signature: _____ Date: _____

General Manager/General Sales Manager Signature: _____ Date: _____

The dealership is required to produce photo copies of all required supporting documentation in the sales jacket or designated filing system, and the dealership is ultimately responsible for providing proof of eligibility. Ford Motor Company will randomly request documentation to audit Dealer's records to ensure compliance with this requirement. The participating dealership agrees to make available the dealership's records to Ford Motor Company personnel for audit of the vehicle sales claim under this program. Dealers MUST retain for at least two years all records and documents, including journal and ledgers that relate in any way, in all or in part, to covered transactions. Failure to retain such documents will result in chargebacks of paid incentives.