



## 5 Day F&I Training Course Welcome Letter

Contact:  
Joe Cortez, Training Coordinator  
949-405-0911  
joe.cortez@swds.net

Thank you for choosing to advance your knowledge by participating in our Finance and Insurance Training course. Below you will find details for your stay.

**CLASS:** Training will be held at the SouthWest Dealer Services training center, 8659 Research Dr., Irvine, CA 92618. Hours for class are:  
Monday - Thursday 8:30a.m. - 5:30p.m.  
Friday 8:30a.m. - 4:00p.m.

A daily shuttle, departing at 8:00a.m., will bring you to class daily and pick you up from class at approximately 5:30p.m. to return you to the hotel. Because a large amount of material will be covered in a relatively short time, it is imperative that you are on time each day.

Please be advised that students should anticipate approximately 2 - 4 hours of homework each night. It is strongly advised to check in at your hotel the night prior to your class to avoid traffic or flight problems. If you will be using the hotel shuttle to and from the training center, make sure you inform the hotel upon arrival.

If you will be flying please be aware that upon completion of class you will receive a 3", 3 ring binder and a 12.5" x 15.5" plaque which you will be able to take home with you. Please pack and prepare accordingly.

**DRESS:** Business attire (no blue jeans, shorts, t-shirts, etc.)

**HOTEL:** Ayres Hotel Laguna Woods  
24341 El Toro Rd  
Laguna Woods, CA 92637  
ph: (949) 588-0131

Room rate is \$149.00 per night (plus tax) for a single room, no parking charge. Please let the hotel know you are with SouthWest Dealer Services when making the reservation to receive our discounted rate.

Please make your room reservation as soon as you know you are going to be joining us for our training course. We recommend booking your room no less than one week prior to your arrival as the Ayres Hotel Laguna Woods can reach capacity quickly.

The Ayres Hotel Laguna Woods will provide shuttle service to and from John Wayne Airport provided you call the hotel directly no later than the Friday prior to your arrival, before 5:00p.m. PST.

**NOTE:** Complimentary breakfast, internet access, and airport shuttle (7 a.m.-10 p.m. only) are also included in your hotel package.

The Ayres Hotel Laguna Woods will provide shuttle service to and from John Wayne Airport provided you call the hotel directly no later than the Friday prior to your arrival, before 5:00p.m. PST.

We look forward to seeing you.

Best,  
Joe Cortez  
949-405-0911  
joe.cortez@swds.net  
Southwest Dealer Services, Inc.



# Travel and Directions

Contact:  
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## TRAVEL:

If you will be flying in, please note the closest airport to our office is **John Wayne Airport in Santa Ana**.

When booking return flights, and as a courtesy to our instructors, please keep in mind that class ends at 4:00pm on Friday. Please make sure return flights are booked after this time on Friday so that all topics can be covered before returning to your dealership.

The Ayres Hotel Laguna Woods will provide shuttle service to and from John Wayne Airport provided you call the hotel directly no later than the Friday prior to your arrival, before 5:00pm PST.

## DRIVING:

### From Los Angeles:

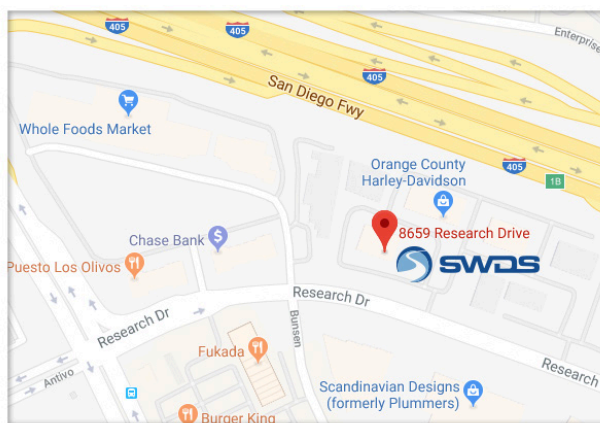
Take I-5 S towards Santa Ana. Use the right 2 lanes to take exit 92 for Bake Pkwy. Turn right onto Bake Pkwy. Turn right at the 1st cross street onto Research Dr. Destination will be on the right.

### From San Diego:

Take I-5 N towards Los Angeles. Use the right 2 lanes to take exit 92B for I-405 N/I-5 N/Bake Pkwy toward Long Beach. Keep right to stay on Exit 92B, follow signs for Bake Pkwy. Use the left 2 lanes to turn left onto Bake Pkwy. Turn right onto Research Dr. Destination will be on the right.

### From San Bernardino (the Inland Empire):

Take I-215 S. Keep left to stay on I-215 S. Keep left at the fork to continue on CA-91 W, follow sign for Riverside/Beach Cities. Use the right 2 lanes to take exit 31 to merge onto CA-57 S toward Santa Ana. Use the left 2 lanes to take exit 1A for I-5 S/Santa Ana. Keep left to continue toward I-5 S. Use the right 2 lanes to take exit 92 for Bake Pkwy. Turn right onto Bake Pkwy. Turn right at the 1st cross street onto Research Dr. Destination will be on the right.





# What to Bring

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## FORMS:

- Blank retail installment and lease contract
- A blank copy of each policy/contract for each product available
- A brochure of each product available
- Blank Agreement to Provide Insurance
- Blank Purchase Order
- Factory Warranty book
- Previous 3 months F&I production numbers
- Payment Type:
  - Check
  - Credit Card (PayPal)
- Copies of menus used (Retail, Cash, Lease)

## SERVICE DEPARTMENT DATA:

- \_\_\_\_\_ How many total R/O's were done the previous month?
- \_\_\_\_\_ How many Customer Pay (R/O's) were written the previous month?
- \_\_\_\_\_ What is the average Customer Pay (R/O) ticket?  
(this needs to include Parts & Labor)
- \_\_\_\_\_ What is your Door Rate (max labor) in the service department?

## PRODUCTS SOLD:

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Vehicle Service Contract | <input type="checkbox"/> S.W.A.T. (GPS Tracking)            | <input type="checkbox"/> KARR Guard (Bundle) |
| <input type="checkbox"/> GAP                      | <input type="checkbox"/> Theft Code (Etch)                  | <input type="checkbox"/> Other_____          |
| <input type="checkbox"/> KARR Security            | <input type="checkbox"/> Finishing Touch (Paint and Fabric) |  |

## CALCULATOR

**TAPE RECORDER** (optional, does come in handy)

*A desire to have fun and work hard.*