



Documentation Checklist

Before You Begin

You will need the following information to complete the online credit application form.

- **Contact Information**, including:
 - President/CEO; Authorizing Officer, depending on your business type
 - Billing Address
- **General Business Information**
 - Federal Tax ID#
 - Date of Operation
 - State of Incorporation
 - Number of Employees
 - USDOT#
 - Tax exempt status
- **Liability and Physical Damage Insurance Information** (not required of Government applicants)
 - Insurance Agency/Carrier Name
 - Contact Name
 - Phone Number
- **Primary Bank Reference** (not required of Public Company and Government applicants)
 - Bank Name
 - City, State, Zip
 - Phone & Fax Number
- **Two Lease, Finance or Trade References** (not required of Public Company and Government applicants)
 - Company Name
 - City, State, Zip

Note: A copy of your most recent year-end financial statement is required for all lease agreements of 12 months or longer and for self-insurance requests. Financial statements are held in confidence, in accordance with XTRA Lease's Privacy Policy.

Please contact your local XTRA Lease branch for more information.