

**Client Information and Credit Application**

Legal Business Name: \_\_\_\_\_ Trade Name(s) \_\_\_\_\_

Physical Address: \_\_\_\_\_  
 (City, Province/State, Postal/Zip Code)

Mailing Address \_\_\_\_\_  
 (City, Province/State, Postal/Zip Code)

Other if applicable (e.g. Ship To address): \_\_\_\_\_

Year Established: \_\_\_\_\_ Business Tel: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_

General Email: \_\_\_\_\_ Website address: \_\_\_\_\_

Business Type:  Corporation  Proprietorship  Partnership  Other \_\_\_\_\_

Is company listed with Dun & Bradstreet?  Yes  No If yes, D&B # \_\_\_\_\_

Nature of Business: \_\_\_\_\_  
 \_\_\_\_\_

Type of products and estimated volume of imports/exports: \_\_\_\_\_  
 \_\_\_\_\_

\_\_\_\_\_ (attach descriptive literature, rulings, HS tariff information if available)

GST Number \_\_\_\_\_ Have you registered for a CRA import/export account?  Yes  No

CRA Business Number (9 digits): \_\_\_\_\_ RM \_ \_ \_ \_ (i.e. 0001). In most cases, this number is required.

See [http://www.cra-arc.gc.ca/E/pub/tg/rc2/rc2-e.html#P68\\_1840](http://www.cra-arc.gc.ca/E/pub/tg/rc2/rc2-e.html#P68_1840) for explanation.

Company Contact information for import/export \_\_\_\_\_ Email: \_\_\_\_\_

Accounts Payable Contact: \_\_\_\_\_ Email: \_\_\_\_\_

Special Instructions \_\_\_\_\_  
 \_\_\_\_\_

What is your expected MONTHLY import/export volume in dollars: \$ \_\_\_\_\_

If you are a large firm, would you like information on paying GST direct on a month-end payment plan?  YES  NO

Would you like to be included in our free weekly trade news email: \_\_\_\_\_ (email address)

**Principals, Officers, Partners and/or Owners:**

Name \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_ Tel (\_\_\_\_) \_\_\_\_\_

Name \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_ Tel (\_\_\_\_) \_\_\_\_\_

Name \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_ Tel (\_\_\_\_) \_\_\_\_\_

**Bank Reference:**

Bank Name \_\_\_\_\_ Contact Person \_\_\_\_\_  
 Address \_\_\_\_\_ Tel \_\_\_\_\_ Fax \_\_\_\_\_  
 Account Numbers (specify CAD and US) \_\_\_\_\_

**Trade References:** These are suppliers that presently extend credit to you. Local references preferred. Three required.

Company \_\_\_\_\_ Contact Person \_\_\_\_\_  
 Address \_\_\_\_\_ Fax \_\_\_\_\_

Company \_\_\_\_\_ Contact Person \_\_\_\_\_  
 Address \_\_\_\_\_ Fax \_\_\_\_\_

Company \_\_\_\_\_ Contact Person \_\_\_\_\_  
 Address \_\_\_\_\_ Fax \_\_\_\_\_

**Credit Agreement**

The undersigned ("Customer") has provided the foregoing information, intended to be true and correct, to Courtney Agencies Ltd. for the purpose of obtaining credit from Courtney Agencies Ltd. and/or its associated companies, successors and assigns. In this connection, the Customer hereby authorizes and requests each bank or trade reference listed herein to advise Courtney Agencies Ltd. or its agent of its credit experience with Customer and to express an opinion with respect to same. Further, Customer agrees that Courtney Agencies Ltd. may obtain personal credit reports with respect to its principals, officers, partners and/or owners. Customer acknowledges that Courtney Agencies Ltd. will, at its sole discretion, grant or deny credit with respect to any transaction and establish the terms and conditions under which credit may be granted. If credit is extended, Customer agrees to pay invoices in accordance with the terms and conditions set out by Courtney Agencies Ltd. and further agrees to pay any and all costs of collection.

*All business is conducted in accordance with the Standard Trading Conditions adopted by the Canadian International Freight Forwarders Association Inc. and/or the Canadian Society of Customs Brokers. Copy available upon request or on the web at [www.ciffa.com](http://www.ciffa.com) or [www.cscb.ca](http://www.cscb.ca).*

TERMS: I (We) understand that all invoices are payable within 15 days of the invoice date.

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_ at \_\_\_\_\_.

By: \_\_\_\_\_  
 (Signature) (Title)  
 \_\_\_\_\_  
 (Print Name) (Company)

<i>For use by Courtney Agencies Ltd.:</i>		
Approved By: _____	Title: _____	Date: _____
Account No: _____	Credit Limit: _____	Salesperson: _____