

CBI ASSOCIATES INC.

CALDWELL BROKERAGE

“ENERGETIC & FOCUSED TO SERVE YOU”

CORPORATE HEADQUARTERS

9224 STATE HWY 75 SOUTH
NEW WAVERLY, TEXAS 77358

PO Box 126
NEW WAVERLY, TEXAS 77358

PHONE: 936-344-0098

FAX: 936-344-0093

E-MAIL: LWELCH@CBIASSOCIATES.COM

PROUD MEMBERS OF:

NATIONAL AUTOMATIC MERCHANDISING ASSOCIATION (NAMA)

TEXAS MERCHANDISE VENDING ASSOCIATION (TMVA)

SOUTHWEST VENDING ASSOCIATION (SEVA)

NATIONAL CONFECTIONERS ASSOCIATION (NCA)

TAX ID No.: 46-2793670

100% WOMAN OWNED BUSINESS / INCORPORATED IN THE STATE OF TEXAS

CBI ASSOCIATES INC.

COMPANY BIOGRAPHY AND TRADE EXPERIENCE

CALDWELL BROKERAGE WAS ESTABLISHED IN 1980 BY JACKIE CALDWELL. WITH HIS YEARS OF EXPERIENCE AND HIS DESIRE TO SUCCEED, CBI HAS THRIVED AND GROWN INTO ONE OF THE MOST SUCCESSFUL PRIVATELY OWNED FOOD BROKERS IN THE SOUTHEAST. IN 1987 LISA CALDWELL WELCH JOINED CALDWELL BROKERAGE. FOR OVER 35 YEARS, LISA HAS SUCCEEDED IN GROWING THE BUSINESS USING HER ABILITY TO IDENTIFY NEW SALES OPPORTUNITIES AND CREATE AN EFFECTIVE AND SUCCESSFUL SALES PRESENTATION. THE KEY TO LISA'S SUCCESS IS THE ABILITY TO DEVELOP STRONG RELATIONSHIPS WITHIN THE INDUSTRY BY PROVIDING OPTIMAL CUSTOMER SERVICE, HER COMMITMENT TO EXCELLENCE AND FINAL RESULTS. IN 2014 CALDWELL BROKERAGE BECAME A TEXAS CORPORATION AND CHANGED ITS NAME TO CBI ASSOCIATES INC. (CBI).

PRODUCT DEVELOPMENT SUCCESS

- ❑ WOLFGANG PUCK COFFEE – INTRODUCED WOLFGANG IN THE SOUTHWEST MARKET. WITHIN 1 YEAR RECORDED SALES OF \$450,000. TOOK SALES TO \$1,000,000 IN 2017 AND DOUBLED SALES TO \$2,000,000 IN 2018. IN 2019 RECORDED SALES OF \$3,500,000.
 - ❑ SHASTA BEVERAGES-ANNUAL INCREASE OF 30%. INTRODUCED FAYGO AND SHASTA TO OUR MARKET, INCREASING YTD SALES BY 50%.
 - ❑ SUGAR FOODS 2012 BROKER OF THE YEAR
-

CBI ASSOCIATES INC.

COMPANY BIOGRAPHY AND TRADE EXPERIENCE (CONTINUED)

THE OPERATIONAL PHILOSOPHY OF CBI IS:

- ❑ TO REMAIN FOCUSED ON CUSTOMER ACCEPTANCE AND CONTINUED USE OF OUR PRODUCTS
- ❑ MAINTAIN PRODUCTIVE RAPPORT AND COMMUNICATION WITH CUSTOMERS THROUGH FREQUENT SALES CALLS UTILIZING A WELL QUALIFIED AND ORGANIZED SALES STAFF

THE SALES STAFF OF CBI HAS OVER 100 YEARS OF COMBINED EXPERIENCE IN THE VENDING INDUSTRY.

OPERATOR COVERAGE

- ❑ DEPTH OF COVERAGE: 800 SEPARATE ENTITIES
- ❑ CALL AVERAGE: 6 PER DAY
- ❑ CALL FREQUENCY (ACCORDING TO CUSTOMER RANK):
 - 1) EVERY 2-3 WEEKS
 - 2) ONCE PER MONTH
 - 3) EVERY 6-8 WEEKS

VALUE ADDED SERVICES

- ❑ TELEMARKETING TO DISTANT AREAS BETWEEN CALLS
 - ❑ QUARTERLY PRODUCT INFORMATION MEETING WITH DISTRIBUTORS SALES REPS.
 - ❑ PARTICIPATION IN AN AVERAGE OF 2 TRADE SHOWS EACH YEAR.
 - ❑ DEVELOPMENT & IMPLEMENTATION OF FREQUENT DISTRIBUTOR SALES REP INCENTIVE PROGRAMS.
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CBI ASSOCIATES INC.

OUR TEAM

LISA WELCH – PRESIDENT

LWELCH@CBIASSOCIATES.COM

37 YEARS OF SALES EXPERIENCE AND BUSINESS OPERATIONS

- ❑ POINT OF CONTACT FOR KEY ACCOUNTS AND DISTRIBUTORS TERRITORY WIDE
- ❑ MANAGES SALES FORCE FOR OPTIMUM COVERAGE AND PRODUCT AWARENESS
- ❑ STRATEGIC PLANNING TO INCREASE SALES AND BUILD VOLUME
- ❑ WEEKLY TRAVEL TO MAINTAIN EXISTING BUSINESS AND SEARCH FOR EXPANDING BUSINESS OPPORTUNITIES
- ❑ CREATE CREATIVE SOLUTIONS AGAINST OUR COMPETITION
- ❑ ANALYZE BUSINESS TRENDS
- ❑ REGIONAL SALES MANAGER FOR WOLFGANG PUCK COFFEE

LISA WALKER – OFFICE MANAGER

LWALKER@CBIASSOCIATES.COM

30 YEARS OF SALES, STAFF TRAINING, AND MANAGEMENT EXPERIENCE

- ❑ SALES SUPPORT FOR CUSTOMER BASE
- ❑ SALES PRESENTATIONS AND NEW PRODUCT INTRODUCTION
- ❑ WEEKLY TRAVEL TO MAINTAIN TERRITORY PRESENCE

RANDY WELCH – VICE PRESIDENT

RWELCH@CBIASSOCIATES.COM

20 YEARS OF SALES EXPERIENCE AND BUSINESS OPERATIONS

- ❑ WEST TEXAS VENDING/OCS TERRITORY
- ❑ SALES AND DIRECTOR OF PRISON DISTRIBUTION

JACKIE CALDWELL – CONSULTANT

CALDWELLBROKER@OPLINK.NET

40 YEARS EXPERIENCE IN VENDING/OCS AND PRISON DISTRIBUTION.

- ❑ LEAD CONSULTANT FOR PRISON AND VENDING DISTRIBUTION
-

CBI ASSOCIATES INC.

OUR TEAM (CONTINUED)

LYNDA ARNOLD – SALES

ARNOLD2237@SBCGLOBAL.NET

SATELLITE OFFICE:

MESQUITE TX

30+ YEARS EXPERIENCE IN VENDING & C-STORE SALES

- ❑ VENDING/OCS SALES FOR DALLAS/FORT WORTH, EAST TEXAS AND SOUTHERN OKLAHOMA

RICHARD CAMERON - SALES

RCAMERON526@HOTMAIL.COM

20+ YEARS EXPERIENCE IN DIRECT SALES

- ❑ VENDING/OCS SALES FOR SOUTH TEXAS

CATHY FEELEY – SALES MANAGER

CFEELEY@CBIASSOCIATES.COM

SATELLITE OFFICE:

PHOENIX ARIZONA

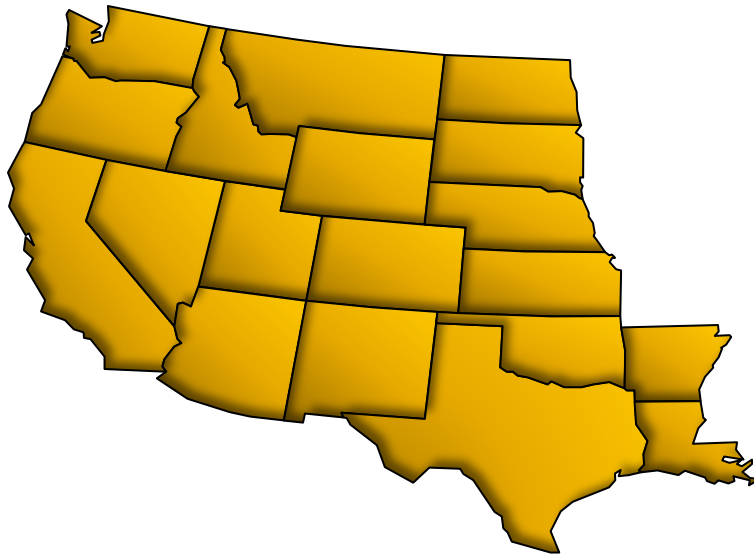
29 YEARS EXPERIENCE IN VENDING, FOOD SERVICE & OCS SALES

- ❑ VENDING/OCS SALES/FOOD SERVICE SALES FOR STATES OF NEW MEXICO, ARIZONA, CALIFORNIA, NEVADA, COLORADO AND UTAH

JUSTIN WELCH - SALES MANAGER

JWELCH@CBIASSOCIATES.COM

- ❑ VENDING/OCS SALES FOR TEXAS, OKLAHOMA AND LOUISIANA
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CBI ASSOCIATES INC.

**GEOGRAPHICAL
COVERAGE**

KEY ACCOUNTS

CBI ASSOCIATES INC.

VEND DISTRIBUTORS

VISTAR HOUSTON

PRESIDENT

ROGER LEVINE

CUSTOMER SERVICE MANAGER

NORMA LONG

OPERATIONS MANAGER

LORRIE BREWSTER

VISTAR NORTH TEXAS

PRESIDENT

DARREN HAMBLÉN

CUSTOMER SERVICE MANAGER

JENNIFER DIETRICH

INVENTORY MANAGER

ELIZABETH TITTARELI

VISTAR OF PHOENIX

PRESIDENT

JAMIE GUADAGNINO

CUSTOMER SERVICE MANAGER

ALISHA DAY

OPERATIONS MANAGER

JANNA BRAUNSTEIN

VISTAR ROCKY MOUNTAINS

PRESIDENT

DAVID SCHLERNITZAUER

CUSTOMER SERVICE MANAGER

ALEX SUTHERLAND

OPERATIONS MANAGER

JENNIFER HODGE

CBI ASSOCIATES INC.

VEND DISTRIBUTORS

VISTAR NORTHERN CALIFORNIA

PRESIDENT

JASON STRANAHAN

SALES MANAGER

JERRY KING

OPERATIONS MANAGER

JACKIE DICICCO

VISTAR NORTHWEST

PRESIDENT

BRAD TUGAW

CUSTOMER SERVICE MANAGER

CHERYL HEINRICH

OPERATIONS MANAGER

APRIL ROYSDON

VISTAR SOUTHERN CALIFORNIA

PRESIDENT

JASON STRANAHAN

CUSTOMER SERVICE MANAGER

SHANNON CAREY

OPERATIONS MANAGER

BRIAN NYHUS

VISTAR KANSAS

PRESIDENT

DARREN HAMBLIN

CUSTOMER SERVICE MANAGER

MARK HODGE

OPERATIONS MANAGER

SCOTT BRAUN

CBI ASSOCIATES INC.

FOOD SERVICE DISTRIBUTORS

REINHART FOODSERVICE

LOUISIANA, L.L.C.

524 WEST 61ST ST
SHREVEPORT, LA

MARKETING MANAGER

MICHELLE GLICK

DOERLE FOOD SERVICE L.L.C.

113 KOL DRIVE
BROUSSARD, LA

VICE PRESIDENT/PURCHASING

RICK BLUM

CBI ASSOCIATES INC.

KEY PRINCIPAL LIST

ALLGOOD FOODS

- PEANUT BUTTER

AUNT DOTS FOODS

- POUCH HOT FOODS
- CHILI/BEEF STEW/ALFREDO

BROTHER KANES CHIPS

- POTATO CHIPS
- BAGEL CHIPS
- PEANUTS & TRAIL MIXES
- PRETZELS

BUMBLE BEE SEAFOOD

- POUCH TUNA/SALMON
- CANNED SARDINES
- ASSORTED SEAFOOD

CHATTANOOGA

- MOON PIES
- "LOOKOUT!" PECAN PIES

CARMELA FOODS

- POUCH VIENNA SAUSAGE

DARLINGTON FARMS

- APPLEWAYS OATMEAL BAR
- SPIKERZ CRACKERS COOKIES

GEISHA

- POUCH TUNA/
MACKEREL/
SARDINES/OYSTERS
/CLAM/FISH STEAKS

GLANBIA

- ON CAKE BITES
- PROTEIN CRISP
- ON PROTEIN ALMONDS, CRISP & WAFERS
- ON AMINO ENERGY DRINKS
- ISOPURE DRINKS

HARVEST HILL

- SUNNY D
- JUICY JUICE
- FRUIT 20
- VERY FINE

HOLIDAY HOUSE

- WATER FILTERS
- WATER COOLERS
- EQUIPMENT & PARTS

MOJO ORGANICS

- PURE COCONUT WATER

POPTIME SNACKS

- SINGLE SERVE POPCORN
- SINGLE SERVE POPPED CHIPS

SCONZA

- YOGURT PRETZELS
- ASSORTED BAGGED CANDY

SHAMROCK FARMS

- MILK
 - ROCKIN PROTEIN DRINKS
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CBI ASSOCIATES INC.

KEY PRINCIPAL LIST

SHASTA/LACROIX/FAYGO

- FLAVORED WATER
- FLAVORED SODA
- ENERGY DRINKS

SLIMFAST

- KETO MEAL BARS
- ADVANCED ENERGY DRINK

SWEET SUE FOODS

- POUCH CHICKEN
- POUCH HAM

SQUEAK N CLEAN

- COFFEE POT CLEANER

THINK

- HIGH PROTEIN BARS

SINGLE CUP COFFEE

- BROOKLYN BEAN
- DONUT SHOP
- HURRICANE
- BARNIES COFFEE KITCHEN
- GUY FIERI
- ORGANA TEA
- SKINNY GIRL
- CAKE BOSS

ALLIANT COFFEE/WOLFGANG PUCK

- COFFEE BEAN & TEA LEAF
- WOLFGANG PUCK COFFEE & TEA
- PORTION PACKS & PODS
- PRIVATE LABEL EQUIPMENT

SUGAR FOODS

- CREAMER & SUGAR
- SWEETENERS
- OATMEAL KITS
- BETTER CHIP
- TACO BELL CHIPS
- N'JOY BRAND PRODUCTS

UNITED FOODS

- PERFECT SERVINGS PRODUCTS
- DISPENSING EQUIPMENT
- POWDERED COCOA, DRINK MIXES & CAPPUCCINO

REUNION ISLAND

- COFFEE & TEA
 - PORTION PACKS & PODS
-

CBI ASSOCIATES INC.

PARTNERSHIP EXPECTATIONS

OUR SUCCESS IS DIRECTLY ATTRIBUTED TO BEING AN INDEPENDENT FIRM THAT CAN FOCUS ON OBJECTIVES AND RELATIONSHIPS UNHAMPERED. WE FEEL THIS GIVES US AN ADVANTAGE OVER LARGE, CORPORATE FIRMS.

SHOULD CBI REPRESENT YOUR PRODUCT LINE, YOU CAN EXPECT:

- ❑ OWNERSHIP WILL BE PERSONALLY INVOLVED.
- ❑ SPECIALIZATION WILL BE APPLIED WHERE NEEDED.
- ❑ ENERGETIC, ORGANIZED SALES CALLS, OFFERING YOUR PRODUCT LINE, WILL BE CONTINUALLY MADE.
- ❑ EDUCATED MARKETING INFORMATION & SUGGESTIONS WILL BE PROVIDED TO YOU.
- ❑ INTEGRITY WILL ALWAYS BE A KEYNOTE IN OUR REPRESENTATION OF YOUR FIRM.
- ❑ OUR RELATIONSHIP WITH KEY ACCOUNTS WILL IMPACT YOUR LINE.

OUR EXPECTATION FOR A MUTUALLY BENEFICIAL PARTNERSHIP:

- ❑ CLOSE WORKING RELATIONSHIP
 - ❑ HIGH LEVEL OF COMMUNICATION
 - ❑ MUTUAL RESPECT BETWEEN BOTH PARTIES
 - ❑ ACCOUNTABILITY
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CBI ASSOCIATES INC.

REFERENCES

SHASTA/BEVCO

MICKEY JONES
DIVISION MANAGER
770-535-2214

SUGAR FOODS

DOUG SARGENT
SALES DIRECTOR
850-287-4990

BUMBLE BEE FOODS

ALAN WHITE
REGIONAL SALES REP
865-966-7321

ALLIANT COFFEE/WOLFGANG

PUCK COFFEE
DON STOULIL
PRESIDENT
425-412-6054
