

CBI ASSOCIATES INC.

CALDWELL BROKERAGE

“ENERGETIC & FOCUSED TO SERVE YOU”

CORPORATE HEADQUARTERS

9224 SH 75S

NEW WAVERLY, TX 77358

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PROUD MEMBERS OF:

NATIONAL AUTOMATIC MERCHANDISING ASSOCIATION (NAMA)

TEXAS MERCHANDISE VENDING ASSOCIATION (TMVA)

CALIFORNIA & ARIZONA VENDING ASSOCIATION (CAVC)

TAX ID No.: 46-2793670

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

UPDATED: 1/15/2026

CBI ASSOCIATES INC.

COMPANY BIOGRAPHY AND TRADE EXPERIENCE

CALDWELL BROKERAGE WAS FOUNDED IN 1980 BY JACKIE CALDWELL AND HAS GROWN INTO ONE OF THE SOUTHEAST'S MOST SUCCESSFUL PRIVATELY OWNED FOOD BROKERS.

IN 1987, LISA CALDWELL WELCH JOINED THE COMPANY AND, OVER THE PAST THREE DECADES, HAS HELPED EXPAND THE BUSINESS BY IDENTIFYING NEW OPPORTUNITIES AND DELIVERING EFFECTIVE, RESULTS-DRIVEN SALES PRESENTATIONS.

HER SUCCESS IS ROOTED IN STRONG INDUSTRY RELATIONSHIPS, EXCEPTIONAL CUSTOMER SERVICE, AND A CONSISTENT COMMITMENT TO EXCELLENCE. IN 2014, THE COMPANY BECAME A TEXAS CORPORATION AND REBRANDED AS CBI ASSOCIATES INC. (CBI).

PRODUCT DEVELOPMENT SUCCESS

- ❑ OUR CURRENT BRANDS HAVE GROWN YEAR-OVER-YEAR SINCE INCEPTION, DRIVEN BY DISCIPLINED EXECUTION AND STRONG RELATIONSHIPS
 - ❑ WE SPECIALIZE IN LAUNCHING, DEVELOPING, AND SCALING PRODUCT LINES THROUGH CONSISTENT SALES ACTIVITY AND MARKET FOCUS.
 - ❑ WE BUILD SUSTAINABLE DISTRIBUTION BY TARGETING THE RIGHT ACCOUNTS, CHANNELS, AND REGIONS—NOT JUST SHORT-TERM PLACEMENTS.
 - ❑ WE PROVIDE ONGOING FIELD FEEDBACK ON VELOCITY, PRICING, COMPETITION, AND PRODUCT MIX TO SHARPEN STRATEGY AND ACCELERATE GROWTH.
 - ❑ OUR PROCESS IS BUILT ON ACCOUNTABILITY, MEASURABLE RESULTS, AND LONG-TERM PARTNERSHIP, DELIVERING REPEATABLE SUCCESS ACROSS BRANDS.
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CBI ASSOCIATES INC.

COMPANY BIOGRAPHY AND TRADE EXPERIENCE (CONTINUED)

THE OPERATIONAL PHILOSOPHY OF CBI IS:

- ❑ STAY FOCUSED ON CUSTOMER ACCEPTANCE AND THE CONTINUED USE OF OUR PRODUCTS.
- ❑ MAINTAIN STRONG CUSTOMER RELATIONSHIPS THROUGH CONSISTENT COMMUNICATION AND FREQUENT SALES CALLS, SUPPORTED BY A HIGHLY QUALIFIED, ORGANIZED SALES TEAM.

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

OPERATOR COVERAGE

- ❑ DEPTH OF COVERAGE: 1/2 CONTINENTAL UNITED STATES
- ❑ CALL AVERAGE: 6 PER DAY
- ❑ CALL FREQUENCY (ACCORDING TO CUSTOMER RANK):
 - 1) EVERY MONTH
 - 2) BI-MONTHLY
 - 3) ONCE A QUARTER

VALUE ADDED SERVICES

- ❑ MARKETING & CUSTOMER SERVICES
 - ❑ QUARTERLY PRODUCT INFORMATION MEETING WITH DISTRIBUTORS SALES REPS.
 - ❑ PARTICIPATION IN AN AVERAGE OF 3-4 TRADE SHOWS EACH YEAR.
 - ❑ DEVELOP & IMPLEMENT ONGOING DISTRIBUTOR SALES REP INCENTIVE PROGRAMS TO INCREASE ENGAGEMENT & SALES
-

CBI ASSOCIATES INC.

OUR TEAM

LISA WELCH – PRESIDENT

LWELCH@CBIASSOCIATES.COM

40+ YEARS OF SALES EXPERIENCE AND BUSINESS OPERATIONS

- ❑ SERVE AS PRIMARY POINT OF CONTACT FOR KEY ACCOUNTS AND DISTRIBUTORS ACROSS DESIGNATED SALES TERRITORIES
- ❑ LEAD AND MANAGE THE SALES TEAM TO MAXIMIZE MARKET COVERAGE AND STRENGTHEN PRODUCT AWARENESS
- ❑ DEVELOP AND EXECUTE STRATEGIC SALES PLANS TO DRIVE REVENUE GROWTH AND INCREASE VOLUME
- ❑ TRAVEL WEEKLY TO SUPPORT EXISTING ACCOUNTS WHILE IDENTIFYING AND PURSUING NEW BUSINESS OPPORTUNITIES
- ❑ CREATE INNOVATIVE, COMPETITIVE SOLUTIONS TO WIN, SHARE AND DIFFERENTIATE FROM COMPETITORS
- ❑ ANALYZE SALES PERFORMANCE AND MARKET TRENDS TO INFORM DECISION-MAKING AND IMPROVE RESULTS
- ❑ NATIONAL SALES MANAGER FOR ALLIANT COFFEE

LISA WALKER – SALES MANAGER

LWALKER@CBIASSOCIATES.COM

25+ YEARS OF SALES, STAFF TRAINING, AND MANAGEMENT EXPERIENCE

- ❑ SALES SUPPORT FOR CUSTOMER BASE
- ❑ CUSTOMER SERVICE
- ❑ MANUFACTURE & DISTRIBUTION SUPPORT

RANDY WELCH – VICE PRESIDENT

RWELCH@CBIASSOCIATES.COM

30+ YEARS OF SALES EXPERIENCE AND BUSINESS OPERATIONS

- ❑ SALES AND DIRECTOR OF PRISON DISTRIBUTION
-

CBI ASSOCIATES INC.

OUR TEAM (CONTINUED)

RICHARD AUBUCHON— SALES REP

RAUBUCHON@CBIASSOCIATES.COM

LINDALE, TX

30+ YEARS EXPERIENCE IN VENDING, MICRO MARKET, OCS

- ❑ DALLAS/FORT WORTH, E. TEXAS, N. LOUISIANA, OKLAHOMA, KANSAS

JUSTIN WELCH— SALES REP

JWELCH@CBIASSOCIATES.COM

HOUSTON, TX

10+ YEARS EXPERIENCE IN VENDING, MICRO MARKET, OCS

- ❑ HOUSTON, S. TEXAS, W. TEXAS, S. LOUISIANA, OREGON

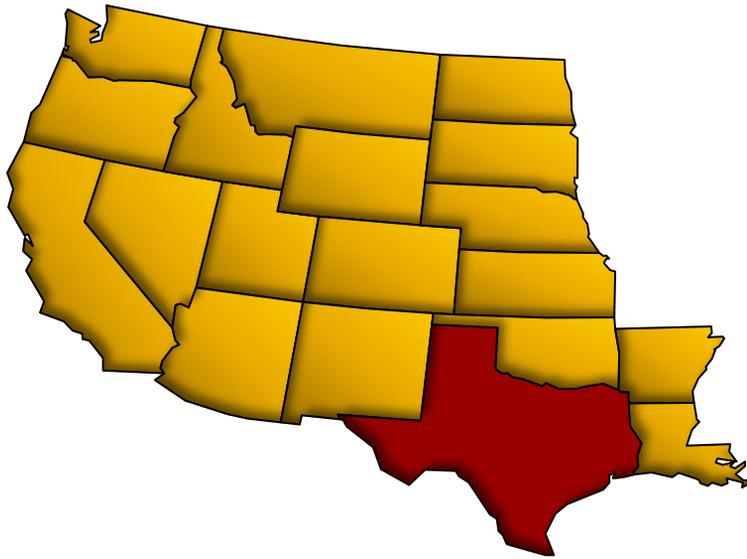
CATHY FEELEY— SALES REP

CFEELEY@CBIASSOCIATES.COM

PHOENIX, AZ

30+ YEARS EXPERIENCE IN VENDING, MICRO MARKET, OCS

- ❑ NEW MEXICO, ARIZONA, CALIFORNIA, NEVADA, COLORADO AND UTAH
-



CBI ASSOCIATES INC.

GEOGRAPHICAL COVERAGE

KEY ACCOUNTS

TEXAS

HOUSTON & SURROUNDING

- CANTEEN
- MCLIFF
- ARAMARK
- JACK'S BREAKROOM
- FIRST CHOICE/DAIOH'S
- ASTRO VENDING
- HEALTHY GEN.
- CHAPMAN VENDING

AUSTIN

- INREACH
- MCLIFF-CORPORATE
- CANTEEN
- ARAMARK
- BLUE TIGER

SAN ANTONIO

- LC VENDING
 - ARAMARK
 - CANTEEN
 - FIRST CHOICE
-

TEXAS

(CONTINUED)

DFW

- MIDSTATES SERVICES INC.
 - MCLIFF
 - ARAMARK CARROLLTON
 - CANTEEN
 - PERKS & PROVISIONS
 - EXECUTIVE REFRESHMENTS
 - LONE STAR
 - ETC.
 - INREACH
 - AMERICAN FOOD & VENDING
-

OKLAHOMA / LOUISIANA

OKLAHOMA

- CANTEEN
- IMPERIAL
- FIRST CHOICE

- LOUISIANA
 - TEN M
 - KENS COFFEE SERVICE
 - LOUISIANA TOM'S
 - FIVE STAR
-

CBI ASSOCIATES INC.

VEND DISTRIBUTORS

VISTAR HOUSTON

VISTAR NORTH TEXAS

VISTAR OF PHOENIX

VISTAR ROCKY MOUNTAINS

VISTAR SOUTHERN CALIFORNIA

VISTAR KANSAS

VISTAR NORTHERN CALIFORNIA

VISTAR NORTHWEST

CBI ASSOCIATES INC.

KEY LIST

CARMELA FOODS

- POUCH FOODS

AUNT DOTS FOODS

- POUCH HOT FOODS
- BEEF STEW/ALFREDO

CHATTANOOGA

- MOON PIES

HOLIDAY HOUSE

- OCS
- WATER FILTERS
- COOLERS/EQUIPMENT

BROTHER KANE'S

- VARIOUS COMMISSARY ITEMS

BUMBLE BEE SEAFOOD

- POUCH SEAFOOD
- CANNED FOOD
- ASSORTED SEAFOOD

GEISHA

- SARDINES/FISH STEAKS
- TUNA/FLAVORED TUNA
- OYSTERS'/CLAMS/OCTOPUS
- MACKEREL-FILET & WHOLE

ALLIANT COFFEE

- OCS
 - DIRECT
 - SOLUBLE & ACCESSORIES
-

CBI ASSOCIATES INC.

KEY LIST

COMMUNITY CHIP

- KETTLE CHIP

LACROIX/SHASTA

- SPARKLING WATER
- SODA

PEELED

- ORGANIC SEMI DRIED
FRUIT

TASTE OF NATURE

- MRS. FIELDS COOKIE
- SHARI CANDIES
- COOKIE DOUGH BITES
- COTTON CANDY

SUGAR FOODS

- CREAMER & SUGAR
 - SWEETENERS
 - N'JOY
 - PRIVATE LABEL
 - PACKETS & CANISTERS
-

CBI ASSOCIATES INC.

PARTNERSHIP EXPECTATIONS

OUR SUCCESS IS BUILT ON THE STRENGTH OF BEING AN INDEPENDENT FIRM—FREE TO FOCUS ON CLEAR OBJECTIVES AND LONG-TERM RELATIONSHIPS WITHOUT CORPORATE CONSTRAINTS. THAT INDEPENDENCE GIVES CBI A DISTINCT ADVANTAGE OVER LARGER, BUREAUCRACY-DRIVEN ORGANIZATIONS.

WHEN CBI REPRESENTS YOUR PRODUCT, YOU CAN EXPECT:

- ❑ HANDS-ON OWNERSHIP INVOLVEMENT THROUGHOUT THE PARTNERSHIP
- ❑ SPECIALIZED FOCUS APPLIED WHERE IT MATTERS MOST
- ❑ CONSISTENT, ENERGETIC, AND ORGANIZED SALES CALLS ACTIVELY DRIVING YOUR LINE FORWARD
- ❑ PROFESSIONAL MARKETING INSIGHT AND RECOMMENDATIONS TO SUPPORT GROWTH
- ❑ INTEGRITY AS A NON-NEGOTIABLE STANDARD IN HOW WE REPRESENT YOUR BRAND
- ❑ STRONG INFLUENCE WITH KEY ACCOUNTS TO EXPAND DISTRIBUTION AND PERFORMANCE

OUR EXPECTATION FOR A MUTUALLY BENEFICIAL PARTNERSHIP:

- ❑ A CLOSE WORKING RELATIONSHIP
 - ❑ A HIGH LEVEL OF COMMUNICATION
 - ❑ MUTUAL RESPECT BETWEEN BOTH PARTIES
 - ❑ CLEAR ACCOUNTABILITY AND FOLLOW-THROUGH
-

CBI ASSOCIATES INC.

REFERENCES

HOLIDAY HOUSE

BARBARA RUSSELL

SALES DIRECTOR

BARBARA@HHDONLINE.COM

GEISHA SEAFOOD

MIKE SULLIVAN

SALES DIRECTOR

SULLIVAN@KAWASHO-FOODS.COM

SHASTA/BEVCO

MICKEY JONES

DIVISION MANAGER

MIJONES@SHASTABEVERAGES.COM

SUGAR FOODS

MIKE KOURY

SALES DIRECTOR

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ALLIANT COFFEE SOLUTIONS

CHRIS TAFFERA

PRESIDENT

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BUMBLE BEE FOODS

KEVIN LABAN

REGIONAL SALES REP

KEVIN.LABAN@BUMBLEBEE.COM
