



# **CBI ASSOCIATES INC.**

**CALDWELL BROKERAGE**

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**“ENERGETIC & FOCUSED TO SERVE YOU”**

**CORPORATE HEADQUARTERS**

9224 ST HWY 75 SOUTH  
NEW WAVERLY, TX 77358

PO Box 126  
NEW WAVERLY, TX 77358

PHONE: 936-344-0098

FAX: 936-344-0093

E-MAIL: [LWELCH@CBIASSOCIATES.COM](mailto: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**

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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 31 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**

- MR. NATURE - CONTINUED YEARLY INCREASE OF 20%
  - WOLFGANG PUCK COFFEE — INTRODUCED WOLFGANG IN THE SOUTHWEST MARKET. WITHIN 1 YEAR RECORDED SALES OF \$450,000. OVER \$1 MILLION IN SALES AS OF OCTOBER 2017
  - 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
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# **CBI ASSOCIATES INC.**

## **COMPANY BIOGRAPHY AND TRADE EXPERIENCE (CONTINUED)**

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### **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**

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### **LISA WELCH — PRESIDENT**

[LWELCH@CBIASSOCIATES.COM](mailto: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
- NATIONAL SALES MANAGER FOR WOLFGANG PUCK COFFEE

### **LISA WALKER — SALES MANAGER**

[LWALKER@CBIASSOCIATES.COM](mailto:LWALKER@CBIASSOCIATES.COM)

25 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](mailto: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](mailto:CALDWELLBROKER@OPLINK.NET)

40 YEARS EXPERIENCE IN VENDING/OCS AND PRISON DISTRIBUTION.

- LEAD CONSULTANT FOR PRISON AND VENDING DISTRIBUTION
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# **CBI ASSOCIATES INC.**

## **OUR TEAM (CONTINUED)**

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### **LYNDA ARNOLD – SALES**

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**

20+ YEARS EXPERIENCE IN DIRECT SALES

- VENDING/OCS SALES FOR SOUTH TEXAS

### **TAMMY WILKINS – SALES**

SATELLITE OFFICE:  
NEW ORLEANS, LA

20+ YEARS EXPERIENCE IN VENDING, FOOD SERVICE & OCS SALES

- VENDING/OCS SALES/FOOD SERVICE SALES FOR STATE OF LOUISIANA

### **CATHY FEELEY – SALES MANAGER**

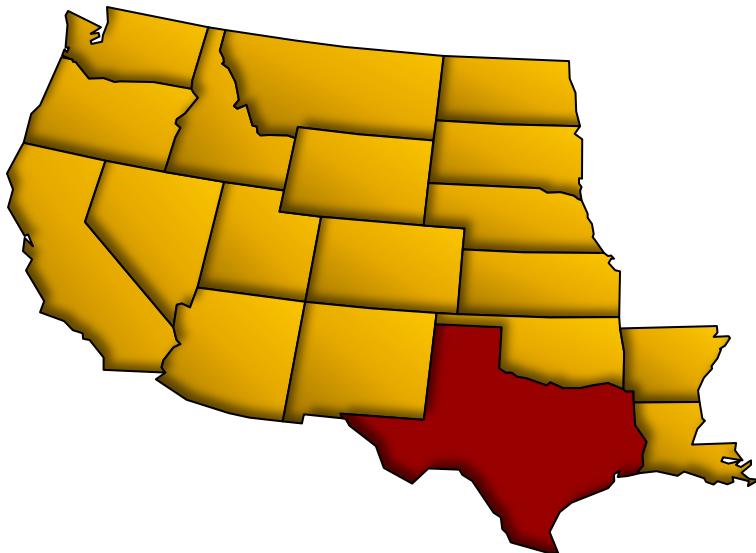
SATELLITE OFFICE:  
PHOENIX ARIZONA

29YEARS EXPERIENCE IN VENDING, FOOD SERVICE & OCS SALES

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

### **ROBIN MCKAY – PROMOTION AND SPECIAL EVENTS COORDINATOR**

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**CBI ASSOCIATES INC.**

# **GEOGRAPHICAL COVERAGE**

**KEY ACCOUNTS**

# TEXAS

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## HOUSTON/BEAUMONT

- MCLIFF
- CANTEEN
- GOLDEN AGE CANTEEN
- FRESH BREW
- PRO STAR
- ARAMARK
- FIVE STAR
- ROME ENTERPRISES
- CITY WIDE
- PRICE & Co.
- MONCLA'S VENDING

## AUSTIN

- ACCENT-CORPORATE
- MCLIFF-CORPORATE
- CANTEEN
- ARAMARK
- CAPITAL VENDING
- YMCA

## SAN ANTONIO

- SAN ANTONIO SNACKS
- LC VENDING
- ACCENT
- ARAMARK
- CANTEEN
- THE MARKET COMPANY  
(CONCESSIONS)
- ARAMARK ALAMODOME  
(CONCESSIONS)

# TEXAS (CONTINUED)

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## **CORPUS CHRISTI BROWNSVILLE/VICTORIA/ HUNTSVILLE**

- SUNRISE VENDING**
- BAY COFFEE**
- CANTEEN SOUTH TEXAS**
- COASTAL VENDING**
- US NAVY EXCHANGE**
- SAM HOUSTON UNIVERSITY**

## **BRYAN**

- ACCENT FOODS**
- BRAZOS WHOLESALE**
- BRENHAM WHOLESALE**

## **LUBBOCK**

- TEXAS STAR  
REFRESHMENTS**
- ACCENT**

## **MIDLAND**

- TEXAS REFRESHMENTS**

## **NACOGDOCHES**

- ACCENT**
- EDMINSTON BROTHERS**
- LONGVIEW SNACK  
SALES**

## **TEMPLE**

- CANTEEN/AUTOMATIC  
CHEF**
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# TEXAS

## (CONTINUED)

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### DALLAS

- PRO STAR CORP.
- MIDSTATES SERVICES INC.
- DWAYNES VENDING / POSTAL SERVICE
- MCLIFF
- ARAMARK CARROLLTON
- CANTEEN
- GREYHOUND BUS
- HANCOCK VENDING
- MAC'S WHOLESALE
- MASTER VENDING/CORSICANA
- PERKS & PROVISIONS
- PARIS SNACKS/CANTEEN
- REFRESHMENT SYSTEMS
- WATER EVENT
- WES-TEX CANTEEN MINERAL WELLS
- CARSWELL NAVAL AIR STATION
- EXECUTIVE REFRESHMENTS

### FORT WORTH

- ACCENT
- CITY VENDING
- PRO STAR
- AMERICAN FOOD & VENDING
- PREMIER VENDING
- SPG VENDING ARLINGTON

# OKLAHOMA / LOUISIANA

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## OKLAHOMA

- CANTEEN/IMPERIAL/6 BRANCHES
- ERIC'S SNACKS
- EXTREME VENDING
- JAZZ VENDING
- PRO STAR
- OZARKA

## LOUISIANA

- MAGNOLIA CANTEEN
- LYON SPECIALTY
- TEN M
- BATON ROUGE TOBACCO
- KENS COFFEE SERVICE
- DS SERVICES

## LOUISIANA (CONT.)

- LONGLEAF CANTEEN
- REFRESHMENT SOLUTIONS
- WAYNE'S VENDING
- LEE DEE DISTRIBUTORS
- J & L VENDING
- JOHN NOTARI SALES
- KAY'S VENDING
- LOUISIANA VENDING MONROE
- LOUISIANA TOM'S
- ROBERTS COFFEE
- M & M SALES/CANTEEN
- RED CARPET VENDING
- ACADIANA VENDING

# CBI ASSOCIATES INC.

## VEND DISTRIBUTORS

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VISTAR HOUSTON  
GENERAL MANAGER  
ROGER LEVINE  
SALES MANAGER  
PHIL BERNISH  
MERCHANDISE MANAGER  
LORRIE BREWSTER

VISTAR NORTH TEXAS  
GENERAL MANAGER  
LEONARD ROBINSON  
MERCHANDISE MANAGER  
MIKE BARR

VISTAR OF PHOENIX  
GENERAL MANAGER  
JAMIE GUADAGNINO  
MERCHANDISE MANAGER  
JANNA BRAUNSTEIN  
SALES MANAGER  
JEFF RAASCH

VISTAR ROCKY MOUNTAINS  
GENERAL MANAGER  
DAVID SCHLERNITZAUER  
MERCHANDISE MANAGER  
ALISHA DOMINIQUEZ  
SALES MANAGER  
TODD FUJINAMI

VISTAR SOUTHERN CALIFORNIA  
PRESIDENT  
MARK HODGE  
SALES MANAGER  
MELANIE VILLANI  
MERCHANDISE MANAGER  
MARY ANN GABRIEL

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VISTAR KANSAS  
PRESIDENT  
DARREN HAMBLEN  
SALES MANAGER  
NOEL CASKEY  
MERCHANDISE MANAGER  
SCOTT BRAUN

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# **CBI ASSOCIATES INC.**

## **VEND DISTRIBUTORS**

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### **VISTAR NORTHERN CALIFORNIA**

#### **PRESIDENT**

JASON STRANAHAN

#### **SALES MANAGER**

JERRY KING

#### **MERCHANDISE MANAGER**

JACKIE DICICCO

### **VISTAR NORTHWEST**

#### **PRESIDENT**

MIKE LEVI

#### **SALES MANAGER**

PATTY PATTERSON

#### **MERCHANDISE MANAGER**

TINA NELSON

### **MASTER WHOLESALE**

**(DALLAS)**

#### **BRANCH MANAGER**

CHRIS WULF— DALLAS

#### **CORPORATE BUYER**

JANE JONES— ST. LOUIS

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# **CBI ASSOCIATES INC.**

## **FOOD SERVICE DISTRIBUTORS**

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### REINHART FOODSERVICE

LOUISIANA, L.L.C.

524 WEST 61<sup>ST</sup> ST

SHREVEPORT, LA

### MARKETING MANAGER

MICHELLE GLICK

### DOERLE FOOD SERVICE L.L.C.

113 KOL DRIVE

BROUSSARD, LA

### VICE PRESIDENT/PURCHASING

RICK BLUM

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# CBI ASSOCIATES INC.

## KEY PRINCIPAL LIST

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### ALLGOOD FOODS

- PEANUT BUTTER

### CARMELA FOODS

- POUCH VIENNA SAUSAGE

### HARVEST HILL

- SUNNY D
- JUICY JUICE
- FRUIT 2O
- VERY FINE

### AUNT DOTS FOODS

- POUCH HOT FOODS
- CHILI/POT ROAST/LASAGNA

### CHATTANOOGA

- MOON PIES

### HOLIDAY HOUSE

- WATER FILTERS, COOLERS, EQUIPMENT

### BROTHER KANES CHIPS

- POTATO CHIPS
- CORN CHIP
- PEANUTS & TRAIL MIXES

### DARLINGTON FARMS

- APPLEWAYS OATMEAL BAR
- SPIKERZ CRACKERS
- COOKIES

### MR. NATURE

- NUTS & RAISINS ASSORTED MIXES

### BUMBLE BEE SEAFOOD

- POUCH TUNA/SALMON
- CANNED SARDINES
- ASSORTED SEAFOOD

### DYLABRANDS

- FORTO ENERGY SHOT

### NUTRABOLT

FITJOY PROTEIN BAR

### BUZZ STRONG

- WHOLE GRAIN COOKIES
- SCHOOL APPROVED BROWNIE

### GEISHA

- POUCH SARDINES/
- TUNA/OYSTERS /MACKEREL/CLAM/ OCTOPUS

### PANOLA

- BOTTLED HOT SAUCE LA HOT/HABANERA/JALAPENO

# CBI ASSOCIATES INC.

## KEY PRINCIPAL LIST

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### REUNION ISLAND

- COFFEE  
TEAS PORTION PACKS &  
PODS

### SINGLE SERVE COFFEE

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

### TEXAS TEA

- TEXAS THEMED  
TEAS

### SCONZA

- YOGURT PRETZELS
- ASSORTED BAGGED  
CANDY

### SUGAR FOODS

- CREAMER & SUGAR
- SWEETENERS
- OATMEAL KITS
- BETTER CHIPS
- COSMOS  
N'JOY

### UNITED FOODS

- PERFECT SERVING  
PRODUCT &  
EQUIPMENT
- COCOA
- POWDER DRINK  
MIXES
- CAPPUCCINO  
POWDERED SOUPS

### SHASTA/FAYGO/LACROIX

- FLAVORED SODAS
- FLAVORED WATER
- ENERGY DRINKS

### SHEARER'S FOODS

- CRÈME & WIRE CUT  
COOKIES
- SALTINE CRACKERS  
CHEESE CRACKERS

### WOLFGANG PUCK

- COFFEE & TEA
- PORTION PACKS &  
PODS
- PRIVATE LABEL  
EQUIPMENT

### SWEET SUE FOODS

- POUCH CHICKEN
- POUCH HAM

### SQUEAK N CLEAN

- COFFEE POT  
CLEANER

### ZAPPS CHIPS

- KETTLE STYLE  
POTATO CHIPS
- PRETZELS
- GOOD HEALTH
- GOLDEN FLAKE

# **CBI ASSOCIATES INC.**

## **PARTNERSHIP EXPECTATIONS**

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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

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### HOLIDAY HOUSE

BARBARA RUSSELL  
SALES DIRECTOR  
800-443-4318

### SUGAR FOODS

DOUG SARGENT  
SALES DIRECTOR  
850-287-4990

### GEISHA SEAFOOD

MIKE SULLIVAN  
SALES DIRECTOR  
212-841-7426

### WOLFGANG PUCK COFFEE

DON STOULIL  
PRESIDENT  
425-412-6054

### SHASTA/BEVCO

MICKEY JONES  
DIVISION MANAGER  
770-535-2214

### BUMBLE BEE FOODS

ALAN WHITE  
REGIONAL SALES REP  
865-966-7321

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