

CBI ASSOCIATES INC.

CALDWELL BROKERAGE

“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

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 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
-

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.
-

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
- ❑ NATIONAL SALES MANAGER FOR WOLFGANG PUCK COFFEE

LISA WALKER — SALES MANAGER

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

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

TAMMY WILKINS — SALES

TWILKINS@CBIASSOCIATES.COM

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

CFEELEY@CBIASSOCIATES.COM

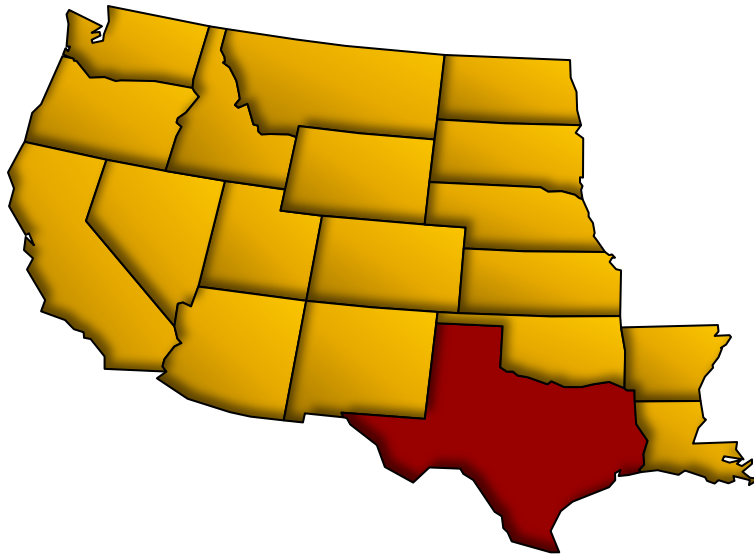
SATELLITE OFFICE:

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



CBI ASSOCIATES INC.

GEOGRAPHICAL COVERAGE

KEY ACCOUNTS

TEXAS

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)

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
-

TEXAS

(CONTINUED)

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

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

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

VISTAR KANSAS

PRESIDENT

DARREN HAMBLIN

SALES MANAGER

NOEL CASKEY

MERCHANDISE MANAGER

SCOTT BRAUN

CBI ASSOCIATES INC.

VEND DISTRIBUTORS

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

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

CARMELA FOODS

- POUCH VIENNA SAUSAGE

HARVEST HILL

- SUNNY D
- JUICY JUICE
- FRUIT 20
- 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

REUNION ISLAND

- COFFEE
- TEAS PORTION PACKS & PODS

SCONZA

- YOGURT PRETZELS
- ASSORTED BAGGED CANDY

SHASTA/FAYGO/LACROIX

- FLAVORED SODAS
- FLAVORED WATER
- ENERGY DRINKS

SWEET SUE FOODS

- POUCH CHICKEN
- POUCH HAM

SINGLE SERVE COFFEE

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

SUGAR FOODS

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

SHEARER'S FOODS

- CRÈME & WIRE CUT COOKIES
- SALTINE CRACKERS
- CHEESE CRACKERS

SQUEAK N CLEAN

- COFFEE POT CLEANER

TEXAS TEA

- TEXAS THEMED TEAS

UNITED FOODS

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

WOLFGANG PUCK

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

ZAPPS CHIPS

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

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
-

CBI ASSOCIATES INC.

REFERENCES

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

MICKY JONES
DIVISION MANAGER
770-535-2214

BUMBLE BEE FOODS

ALAN WHITE
REGIONAL SALES REP
865-966-7321
