



A Pioneering Wholesaler Since 1868

LA CROSSE 2727 Commerce Street
Branch Locations PO Box 1208
MADISON La Crosse, WI 54602-1208
NEW BERLIN Tel: 608-781-2000
PLOVER Tel: 800-279-2726 toll-free
RICE LAKE Fax: 608-781-8372

APPLICATION FOR OPEN ACCOUNT

COMPANY INFORMATION:

Credit Amount Requested: \$
Credit requests of \$20,000 or more require submission of a current balance sheet, P&L, and a statement of cash flows for the past 12 months.

COMPANY LEGAL NAME ("Company")

Street Address PO Box

City County State Zip

Telephone () Fax () Cell/Mobile Phone ()

Mth/Yr Company Started / Mth/Yr Current Ownership Began / Annual Sales \$

TYPE OF BUSINESS: C-Corporation S-Corporation Proprietorship Partnership LLC Other (Describe)

Federal Taxpayer ID #

PLEASE ANSWER THE FOLLOWING:

Have you and/or the Company ever filed for bankruptcy, or had an involuntary petition for bankruptcy filed? YES* NO
Have you and/or the Company ever been a defendant to a claim, judgment, tax lien or lawsuit? YES* NO
Have you and/or the Company ever defaulted on a loan? YES* NO

* If YES, please provide complete details and dates:

Please furnish complete addresses, phone numbers and fax numbers.

BANK REFERENCE:

Bank Name Contact

Address Telephone () Fax ()

Account # Average Balance \$ Loan History: Open Repaid None

TRADE REFERENCES:

Company Contact

Address City State Zip

Telephone () Fax () Account Number

Company Contact

Address City State Zip

Telephone () Fax () Account Number

PRINCIPAL(S) OF THE COMPANY:

Please print below the name(s), title(s), and % ownership, as applicable, of Corporate Officers, all Partners, or all Owner(s). All principal(s)/partner(s)/owner(s) who own 20% or more of the Company, must provide their Social Security number(s) below.

Principal #1

Name Title % Ownership Soc. Sec. #

Principal #2

Name Title % Ownership Soc. Sec. #

APPLICANT SIGNATURE:

By his/her signature below, the undersigned Authorizing Official hereby certifies that he/she is authorized by the Company (a) to sign and deliver this Application, (b) to bind the Company to the terms and conditions of sale, receipt of which by his/her signature below the Authorizing Official hereby acknowledges, and (c) all information contained in this application is true and correct. The authorizing official understands that credit on this account, once approved, will be extended by W.A. Roosevelt Co. and you authorize us to check with credit reporting agencies and other sources we deem appropriate in considering this application and subsequently for purposes of updates, renewals or extensions of credit granted as a result of this application or in receiving or collecting the Account.

Signature of Principal #1 Date

Signature of Principal #2 Date

W.A. ROOSEVELT CO.-CONDITIONS OF SALE

ACCEPTANCE: All orders shall require confirmation by both parties. Confirmation may be verbal, written, fax or electronic, at the discretion of the W.A. Roosevelt Co. Shipment or any other performance of the order by W.A. Roosevelt Co. shall indicate acceptance. All orders are subject to W.A. Roosevelt Co. conditions of sale.

QUOTATIONS: The purchaser is responsible to verify all quotation descriptions, quantities and sizes. Quotations are valid only for the material and terms specified. Any quantities quoted are in direct relation to the prices given. Any changes in quantity or specifications will be subject to a change in the quoted price.

TERMS: Net 30 days unless stated otherwise.

TAXES: In addition to the purchase price, the contractor will pay any federal, state and local sales, excise, use or other taxes arising from the sale or delivery of the products or the use thereof, unless an appropriate exemption certificate is provided to W.A. Roosevelt Co.

FREIGHT: Freight, unless otherwise stated is the responsibility of the purchaser.

DELIVERY: W.A. Roosevelt Co. reserves the right to make delivery in one (1) shipment unless otherwise agreed upon at time of order. Orders are subject to partial shipment at our option. If an order has multiple releases specified by the purchaser, each release will be treated as an individual order, relative to freight allowance and minimum billing. All delivery dates are estimated as closely as possible based on information available from the manufacturer. W.A. Roosevelt Co. will make every effort to ship within the time promised. However, delivery dates will not be guaranteed. Drop shipped orders, with a destination other than the agreed upon location(s) are subject to all costs incurred by the change in destination.

AMENDMENTS OR CANCELLATIONS: Amendment to, or cancellation of any product or service must be agreed to by both parties. Confirmation required may be verbal, written, fax or electronic, at the discretion of the W.A. Roosevelt Co. All costs, including re-stocking charges, incurred as a result of amendments or cancellations will be the responsibility of the requesting party.

LIABILITY: W.A. Roosevelt Co., and its suppliers, shall not be liable in contract or otherwise for any special, indirect, incidental or consequential damage whatsoever.

CLAIMS/DAMAGE/DISCREPANCIES: Claims for shortages or damaged goods must be noted on the freight bill prior to signing for receipt of the material. Any concealed damage or shortage claims must be made to the delivery carrier within 48 hours of receipt of material.

BILLING QUESTIONS/DISPUTES: W.A. Roosevelt Co. will make every effort to resolve billing questions or disputes promptly. To expedite your inquiry please provide the following, preferably in writing, within 60 days of invoice date:

- Name and account number
- The invoice number that contains the error
- The reason why you believe there is a mistake

RETURNS/RESTOCKING: W.A. Roosevelt Co. recognizes that there may be an occasional need to return purchased material. To be assured of prompt credit to your account please supply the following information:

- Original Invoice number and Date (or copy of Invoice)
- Product number and Description
- Reason for return

The following material does not qualify for credit:

- Overages from shipments purchased with negotiated pricing
- Material not purchased from us
- Material not in salable condition
- Material must be returned with original cartons
- Special order material that we cannot return to the manufacturer
- Obsolete or close-out inventory
- Damage or shortage claims beyond 48 hours from receipt of material
- Material beyond 120 days of invoice

STOCK MATERIAL: There is no restocking charge for material returned within 30 days of the invoice date. You will be charged a restocking fee for material returned beyond 30 days as follows:

- Returned from 30 to 90 days of invoice date: 10% restocking charge
- Returned from 90 to 120 days of invoice date: 25% restocking charge

NON-STOCK MATERIAL: All sales of specially ordered material are considered final. W.A. Roosevelt Co. at their discretion may contact the manufacturer with a special request for return authorization. The material cannot be returned until this authorization is given by the manufacturer and the terms and conditions of the return have been agreed upon by both parties. If return is authorized, the following will apply:

- A minimum restocking charge of 25% (this may be higher depending on manufacturer)
- A charge for any additional handling fees and all related freight charges

Please note: When material is returned to the manufacturer, credit will be issued as soon as we receive credit from the manufacturer.

WARRANTY MATERIAL: Many of our products offer extra value in the form of manufacturer's warranties. The following information is necessary for processing warranty claims:

When returning defective product -

- Original invoice number and date
- Product number and description
- Detailed description of defect
- Product date code, if applicable

When servicing or returning product with a serial number -

- Model and serial numbers
- Date of installation
- Date of failure
- Home owner name, address, and telephone number

We appreciate your business! The information you provide us in the event a return is needed will insure that a prompt credit can be issued to your account. Thank you!



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To allow us to serve you better, please provide us with the following information:

Primary Business:

- Contractor - primarily commercial
Contractor - primarily residential
Manufacturing
Other commercial / institutional
Agricultural
Governmental entity / school
Retail / Other wholesale / Cooperative
Other (please describe)

Contractor Trade (Primary):

- Plumbing
Electrical
HVAC
Refrigeration
General
Other (please describe)

Email address for sending invoices and statements:

Check box if you do NOT want invoices and statements emailed

Approximate number of employees: _____

Annual sales volume of your company: \$ _____

Estimated purchases from W. A. Roosevelt Co. will be: _____ (monthly)

Person responsible for purchases: _____

Do you use purchase orders: Yes No

Person responsible for payment: _____

Do you generally pay by: Invoice Statement

Do you allow your employees to purchase on your account for cash: Yes No

Sales tax-exempt: Yes No (If yes, please complete the applicable certificate.)

GUARANTY OF INDEBTEDNESS

(Required if credit limit request is over \$1000)

In consideration of the extension of credit by W.A. Roosevelt Company, hereinafter called "Roosevelt" to the business making application for account as set forth above, hereinafter referred to as the "Company", we, the undersigned, hereby personally guarantee to Roosevelt the payment of any obligation of the Company to Roosevelt. Further, we hereby further guarantee to bind ourselves to pay the same according to the payment terms required by Roosevelt. It is understood that this guaranty shall be a continuing and irrevocable guaranty. We hereby agree to indemnify Roosevelt for any loss suffered or incurred by it arising out of the extension of credit to the Company. We hereby waive notice of default and non-payment, and consent to any modification or renewal of the credit relationship between the Company and Roosevelt hereby guaranteed. We agree to pay all costs incurred by Roosevelt for collection, including actual attorney's fees and costs.

Dated this day: _____ of _____, at city/state _____

Signature: _____ Signature: _____

Print Name: _____ Print Name: _____

Social Security #: _____ Social Security #: _____

Address: _____ Address: _____

City/State/Zip: _____ City/State/Zip: _____