

## Client Set-Up Instructions

-Power of Attorney is required. If you are a licensed U.S. Customs Broker, we will need a sub POA issued by your firm, as well as a copy of the original POA issued to your firm by the customer. Otherwise, we will need to obtain a direct POA from the client. Please make sure it contains accurate, complete information.

NOTE: We are more than happy to fill out the POA for you to obtain signatures.

The following information is required for us to complete the POA:

- ❑ Complete Legal Name & Address of Company (Are they an Incorporated Division of a Parent Corp or an Un-Incorporated Division used by a Parent Corp? Are they an Individual, Partnership or Sole-Proprietorship?)
- ❑ If they are a US company, their Federal Tax ID # (IRS#) is required. If a US individual, their Social Security number is required.
- ❑ If they are a Canadian Company that has previously imported into the US, we will need their Customs Assigned Number, if available. We will obtain numbers for Cdn. Companies who have not previously been assigned one.
- ❑ Names & Titles of 2 signing officers. (For Corporations, we need names of President, Treasurer, Vice President, Secretary, CEO, CFO or COO. For Partnerships, we need names of Partners, Members, Directors or Owners, as well as a copy of the partnership agreement.)
- ❑ A witness is also required to sign the POA. This can be anyone within the company. Please provide the name & title of a witness.

Note: If you are obtaining POA/signatures directly, please ensure the above information is placed on the POA forms correctly to prevent having to make amendments.

-Complete the Customer Information Sheet and Product Information Packet.

-Once all information is complete, please return to Cataract Customhouse Brokerage Inc., as per instructions below and we will review for accuracy and set up the account.

Susan Miles: [smiles@cataracthbinc.com](mailto:smiles@cataracthbinc.com)

Please cc Amy Burgess: [aburgess@cataracthbinc.com](mailto:aburgess@cataracthbinc.com)

Or fax to: 716-773-9445

Thank you!