



# CREDIT APPLICATION

Equipment Financing | Cat® Card | Cat® Vantage

Caterpillar Financial Services Limited  
 Caterpillar Financial Services Leasing ULC  
 Ph: 1-800-651-0567  
 Email CFSApplicationgroup@cat.com

|                  |                          |                   |
|------------------|--------------------------|-------------------|
| For Internal Use | Local Dealer / Sales Rep | Dealer Customer # |
|------------------|--------------------------|-------------------|

|                           |                    |                                                          |
|---------------------------|--------------------|----------------------------------------------------------|
| *BUSINESS/LEGAL NAME      | EXISTING CUSTOMER  | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| TRADE NAME (Operating As) | *YEARS IN BUSINESS |                                                          |

## DIRECT OWNER INFORMATION

Know Your Customer policies protect both borrowers and lender.  
 Sole proprietors, signatories and personal guarantors could be asked to supply proof of their identity.

|                          |                                                                                                                                                                                                   |  |  |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| *Number of Direct Owners | <input type="checkbox"/> 1 owner (List details below) <input type="checkbox"/> 2 owners (List details of both below) <input type="checkbox"/> More than 2 owners (List details for top two below) |  |  |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|

*Individuals or Corporations that own 50% or more must be identified*

|          |                                            |
|----------|--------------------------------------------|
| *Name    | *% of Ownership <small>Number only</small> |
| *Title   | Date of Birth (MM/DD/YYYY)                 |
| *Address | SIN (Optional)                             |
| *Email   | *Phone/Cell Number                         |

|         |                                           |
|---------|-------------------------------------------|
| Name    | % of Ownership <small>Number only</small> |
| Title   | Date of Birth (MM/DD/YYYY)                |
| Address | SIN (Optional)                            |
| Email   | Phone/Cell Number                         |

## CAT® CARD

What is Cat card? Unsecured line of credit to pay for Cat parts, services, work tool and rentals

### Please assign Cat card authorized user(s)

Each user assigned below will be authorized to make charges and be assigned a unique transacting number. If left blank, the direct owner(s) listed above will be designated as authorized user(s).

|       |                                                    |
|-------|----------------------------------------------------|
| *Name | <input type="checkbox"/> Already enjoying Cat card |
| Name  |                                                    |
| Name  |                                                    |

| BUSINESS ADDRESS                          | STREET ADDRESS | CITY | PROV | POSTAL CODE |
|-------------------------------------------|----------------|------|------|-------------|
| *Physical Address                         |                |      |      |             |
| *Billing Address                          |                |      |      |             |
| <input type="checkbox"/> Same as Physical |                |      |      |             |

|                  |             |
|------------------|-------------|
| *Contact Name #1 | *Title      |
| *Email           | *Cell Phone |
| Contact Name #2  | Title       |
| Email            | Cell Phone  |

| *COMPANY TYPE (Check one)              |                                         | *INDUSTRY TYPE (Select all that apply)      |                                       |                                               |
|----------------------------------------|-----------------------------------------|---------------------------------------------|---------------------------------------|-----------------------------------------------|
| <input type="checkbox"/> Individual    | <input type="checkbox"/> Proprietorship | <input type="checkbox"/> Agriculture        | <input type="checkbox"/> Forestry     | <input type="checkbox"/> General Construction |
| <input type="checkbox"/> Partnership   | <input type="checkbox"/> Corporation    | <input type="checkbox"/> Heavy Construction | <input type="checkbox"/> Mining       | <input type="checkbox"/> Petroleum            |
| <input type="checkbox"/> First Nations | <input type="checkbox"/> Governmental   | <input type="checkbox"/> Power Systems      | <input type="checkbox"/> Rental House | <input type="checkbox"/> Trucking / Engines   |

**THIS IS ALSO AN APPLICATION FOR A CAT® CARD ACCOUNT AND THE ASSOCIATED CAT® VANTAGE REWARDS PROGRAM AND THE BELOW TERMS AND CONDITIONS APPLY TO THAT OFFERING:**

Terms and Conditions

Authorization: You certify that you have authority to bind the applicant to the terms & conditions of this offer and the Customer Agreement for Cat® Card and Cat Card Rewards Program ("Cat Card Agreement") and to initiate enrollment in the Cat® Vantage Rewards Program. When you sign this application, Applicant agrees to the following:

1. If a Cat Card Account is offered to Applicant, Applicant will receive a Cat Card Agreement with a welcome package. Applicant agrees to the terms of the Cat Card Agreement by doing any of the following: using the Cat Card Account, authorizing use of the Cat Card Account, or making any payment on the Cat Card Account. If Applicant does not agree to the terms of the Cat Card Agreement, Applicant should not use, or authorize the use of, the Cat Card Account. Applicant may close the Cat Card Account to further charges by providing notice in accordance with the Cat Card Agreement.
2. By providing Applicant's mobile number and/or email address, Applicant acknowledges that they may be contacted at that number/address about all of Applicant's accounts by Cat Financial Services Limited ("CFSL") and companies working on its behalf to the extent permitted by law (including, without limitation, for informational and account servicing). Message and data rates may apply.
3. Rates, fees, and terms may change: CFSL has the right to change the account terms (including the APRs) in accordance with the Cat Card Agreement.
4. The Cat Card Account may be used only for business purposes.
5. Applicant further agrees to be automatically enrolled in the Cat Card Rewards Program as set forth in the Cat Card Agreement and automatically enrolled in the Cat Vantage Rewards Program, as either program might be renamed or amended from time to time. Applicant's primary email address and contact details will be used to establish this initial record. Terms and conditions governing Cat Card Rewards are found in the Cat Card Agreement. Terms and conditions governing Cat Vantage Rewards are found at [www.cat.com/GetRewarded](http://www.cat.com/GetRewarded). Usage of Rewards programs shall signify acceptance of the terms and conditions of such programs. Applicant can earn Cat Vantage Rewards without originating a Cat Card Account or using a Cat Card for payment. Applicant can unenroll from the Cat Vantage Rewards Program by contacting customer service as set forth on the program website.
6. A complete copy of the Cat Card Agreement is available in English at <https://www.cat.com/catcardagreement> and in French at <https://www.cat.com/catcardagreement-fr>. A complete copy of this application is available in French at <https://www.cat.com/applyforcatacard-fr>. The Applicant and CSFL have agreed that this application and the Cat Card Agreement as well as the documents relating to them be drawn up in English. Le demandeur (Applicant) et CSFL ont convenu que cette demande (application) et le Cat Card Agreement ainsi que les documents s'y rattachant soient rédigés en anglais.

Authorized Users: Applicant may designate authorized users of the account (see above). Such notification must be in writing, and Applicant agrees to be liable for all transactions made by any authorized user, even if Applicant did not approve or give authorization for a specific transaction. If a Cat Card Account is approved, authorized users will have access to 100% of the approved credit access line and any amount over the credit access line authorized in accordance with the Cat Card Agreement. To set spending limits on any authorized users, please contact our Customer Service Department at 1-877-373-9510 after the account has been opened.

**NOTICE: Applicant and each owner, principal, guarantor or other person signing below ("I/we", "me/us") jointly and severally represent and warrant that the information provided herein or in connection with this application is true and correct and that I am the duly authorized representative of the company named herein. I/we consent to Caterpillar Financial Services Limited ("CFSL") and/or Caterpillar Financial Services Leasing ULC ("CFSLU") obtaining a consumer report and other credit, financial and related personal information ("Credit Report") about me/us from, and disclosing Credit Reports to, any credit reporting agency, credit bureau, financial institution, business or any other third party with whom I/we have had or may have a financial relationship. I/we acknowledge that any such information will be obtained about me/us from time to time in connection with this application including for the purpose of determining whether credit will be granted and ongoing creditworthiness. In particular, I/we understand that CFSL and/or CFSLU will use my/our consent provided for in this application to obtain Credit Reports about me/us for the purposes of: making a decision about my credit application, assessing my credit worthiness in connection with approving additional financial transactions, monitoring, evaluating, servicing, collecting and otherwise enforcing my account, and responding to inquiries about my application, account, or file.**

**In particular, I/we consent to the collection, use and disclosure of personal information as further described in the Caterpillar Financial Services Limited and/or Caterpillar Financial Services Leasing ULC Canadian Privacy Statement, available at <http://www.caterpillar.com/dataprivacy> or by calling 1-800-651-0567.**

**I/we acknowledge that the consents set out herein or provided in connection with this application shall continue for as long as I/we continue to have a relationship with CFSL and/or CFSLU.**

|           |  |                   |  |
|-----------|--|-------------------|--|
| NAME      |  | TITLE             |  |
| SIGNATURE |  | DATE (MM/DD/YYYY) |  |

|           |  |                   |  |
|-----------|--|-------------------|--|
| NAME      |  | TITLE             |  |
| SIGNATURE |  | DATE (MM/DD/YYYY) |  |

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