



CREDIT APPLICATION

Equipment Financing | Cat® Commercial Account | Cat® Rewards

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

*BUSINESS/LEGAL NAME		EXISTING CUSTOMER	☐ Yes ☐ 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.

A minimum of 76% ownership must be identified

Any individuals or entities that directly or indirectly own 25% or more must be identified

Definitions:**

Politically Exposed Person "PEP": Individual or individual who has a family member who holds, or has held, a prominent public position

Head of an International Organization "HIO": Individual or individual who has a family member who holds, or has held, a senior leadership position in an international organization

*Name		*% of Ownership Number only	
*Title		*Date of Birth (MM/DD/YYYY)	
*Home Address		*PEP or HIO** (Yes/No)	
*Email		*Phone/Cell Number	
Name		% of Ownership Number only	
Title		Date of Birth (MM/DD/YYYY)	
Home Address		PEP or HIO** (Yes/No)	
Email		Phone/Cell Number	
Name		% of Ownership Number only	
Title		Date of Birth (MM/DD/YYYY)	
Home Address		PEP or HIO** (Yes/No)	
Email		Phone/Cell Number	
Name		% of Ownership Number only	
Title		Date of Birth (MM/DD/YYYY)	
Home Address		PEP or HIO** (Yes/No)	
Email		Phone/Cell Number	

DIRECTOR INFORMATION

Know Your Customer policies protect both borrowers and lender.

*Name	*Date of Birth (MM/DD/YYYY)	*Country of Residence

CAT® COMMERCIAL ACCOUNT

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

Please assign Cat Commercial Account 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		☐ Already enjoying Cat® Commercial Account
Name		
Name		

BUSINESS INFORMATION				
BUSINESS ADDRESS	STREET ADDRESS	CITY	PROV	POSTAL CODE
*Physical Address				
*Billing Address ☐ 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)		
☐ Individual	☐ Proprietorship	☐ Agriculture	☐ Forestry	☐ General Construction
☐ Partnership	☐ Corporation	☐ Heavy Construction	☐ Mining	☐ Petroleum
☐ First Nations	☐ Governmental	☐ Power Systems	☐ Rental House	☐ Trucking / Engines

THIS IS ALSO AN APPLICATION FOR A CAT® COMMERCIAL ACCOUNT AND THE ASSOCIATED CAT® 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® Commercial Account ("Cat Commercial Account Agreement") and to initiate enrollment in the Cat® Rewards Program. When you sign this application, Applicant agrees to the following:

1. If a Cat Commercial Account is offered to Applicant, Applicant will receive a Cat Commercial Account Agreement with a welcome package. Applicant agrees to the terms of the Cat Commercial Account Agreement by doing any of the following: using the Cat Commercial Account, authorizing use of the Cat Commercial Account, or making any payment on the Cat Commercial Account. If Applicant does not agree to the terms of the Cat Commercial Agreement, Applicant should not use, or authorize the use of, the Cat Commercial Account. Applicant may close the Cat Commercial Account to further charges by providing notice in accordance with the Cat Commercial Account 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 Commercial Account Agreement.
4. The Cat Commercial Account may be used only for business purposes.
5. Applicant further agrees to be automatically enrolled in the Cat Rewards Program. Applicant's primary email address and contact details will be used to establish this initial record. Terms and conditions governing Cat Rewards are found on the program website, <https://www.cat.com/rewards>. Participation in Cat Rewards shall signify acceptance of the terms and conditions of the program. Applicant can earn Cat Rewards without originating a Cat Commercial Account or using a Cat Commercial Account for payment. Applicant can unenroll from the Cat Rewards Program by contacting customer service as set forth on the program website.
6. A complete copy of the Cat Commercial Account Agreement is available in English at <https://www.cat.com/accountagreement> and in French at <https://www.cat.com/contratdecompte>. A complete copy of this application is available in French at <https://www.cat.com/comptecommercial>. The Applicant and CSFL have agreed that this application and the Cat Commercial Account 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 Commercial Account Agreement ainsi que les documents s'y rattachant soient rédigés en anglais.

Authorized Users: Applicant may designate authorized users of the Cat Commercial 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 Commercial 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 Commercial Account 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 in all respects, including all company ownership information, and that I am the duly authorized representative of the company named herein. For the avoidance of doubt, I/we confirm by signature hereunder that all ownership information provided herein, including beneficial ownership, is accurate. 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. I/we agree to promptly notify CFSL and/or CFSLU in writing if any information provided in this application becomes inaccurate, incomplete, or misleading.

NAME		TITLE	
SIGNATURE		DATE (MM/DD/YYYY)	

NAME		TITLE	
SIGNATURE		DATE (MM/DD/YYYY)	