**10/5/2020**

**Client Profile:** client name

**Official Business Name: Click here to enter text.**

**Trading Name (if different): Click here to enter text.**

**Existing Customer?  Yes No**

**Sister Companies or Subsidiaries: Click here to enter text.**

**Main Address: Click here to enter text.**

**Main Phone Number: Click here to enter text.**

**Billing Address (If Different): Click here to enter text.**

**Business Number: Click here to enter text.**

**C-TPAT Account Number (if applicable): Click here to enter text.**

**Customs Assigned Number (for US Brokerage): Click here to enter text.**

**Start Date: Click here to enter text.**

**Commodity: Click here to enter text.**

**Brief Overview of the Business: Click here to enter text.**

**Please Check Applicable Services:**

CAD Customs Brokerage

US Customs Brokerage

Trans-border Logistics

Domestic Logistics/Courier

International Freight Forwarding

Trade Management Services

Trade Consulting (NAFTA retrieval, duty drawback, etc.)

**Method of Payment:**  Cheque  Wire/EFT  Credit Card[[1]](#footnote-1)

**Billing Currency Canadian Customs Brokerage:** Click here to enter text.

**Billing Currency US Customs Brokerage: Click here to enter text.**

**Billing Currency Logistics:**

**Billing Contact Name:** Click here to enter text.

**Billing Contact Phone Number: Click here to enter text.**

**Billing Contact E-mail Address: Click here to enter text.**

**Frontier Team:** Click here to enter text.

**Frontier ISR: Click here to enter text.**

**Business Development Manager:** Click here to enter text.

**Contacts**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of Contact** | **Title/Position** | **Email** | **Main Phone** | **Secondary Phone** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **\*Add Customs Broker (if Frontier is not the broker)** |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Customs Brokerage**

Canadian Power of Attorney/GAA  US Power of Attorney/GAA

Direct Security Letter  Release Prior to Payment Bond

Bond Foreign Exchange Letter (US billed clients)  NRI Corporate Certification (US Brokerage Client)

ARL EDI Application completed by client

Credit approved

**CAD Brokerage/Fees:**

**AB Entry Fee:** Click here to enter text.

**Courier Low Value Shipment Fee (under $3300 in value):** $Click here to enter text.

**Deminimis Fee (under $150 in value):** Click here to enter text.

**Ocean Clearance Fee:** Click here to enter text.

**CCI Line Fee:** Click here to enter text.

**Number of Free Lines:** Click here to enter text.

**SWI Fee:** Click here to enter text.

Check box if client is under base rate ancillary fees, if not provide specific client rate schedule

**Client will be paying direct:**  Duty  GST

**Frontier will be paying on client’s behalf:**  Duty  GST

**Method of payment to customs:**  Electronic banking (direct)  Couriered cheque (to Frontier)

\*Courier Cheque fee of $45 will be charged to the client if sending Frontier a cheque

**Approximate Total # of transactions per year:** Click here to enter text.

**Average number of transactions per year by mode of transport:**

**Standard US-Canada Border Release:** Click here to enter text.

**Courier Low Value Shipments (under $2500 in value):** Click here to enter text.

**Ocean:** Click here to enter text.

**Air:** Click here to enter text.

**Average # of CCI Lines per invoice:** Click here to enter text.

**Is the client under TMS?**  Yes  No

**Tariff Database provided?**  Yes  No

If no explain how products will be classified: Click here to enter text.

**List Potential OGDs:** Click here to enter text.

**Is export reporting required?**  Yes  No

If yes, what is CAED authorization ID #?Click here to enter text.

**Additional Clearance Requirements:** Click here to enter text.

**Freight payments:** Click here to enter text.

**CBSA audit results or rulings:** Click here to enter text.

**Past rulings provided:** Click here to enter text.

**Ruling requests required for future imports:** Click here to enter text.

**Valuation of goods:** Click here to enter text.

**Arrange cartage:** Click here to enter text.

**Does client take cash or prepaid freight discounts?**  Yes  No

**US Brokerage/Fees:**

**U.S. Customs Entry Filing:** Click here to enter text.

**Line fee:** Click here to enter text.

**Number of free lines:** Click here to enter text.

**Importer Security Filing:** Click here to enter text.

**Bond Type: Single-Entry Transaction Bond**   **Annual Continuous Bond**

**ISF Bond:** Click here to enter text.

**Partner/Government Agency Filing:** Click here to enter text.

**Courier/Messenger:** Click here to enter text.

**Other Charges:** Click here to enter text.

Check box if client is under base rate ancillary fees, if not provide specific client rate schedule

**Method of payment to customs:**  Electronic banking (direct)  Couriered cheque (to Frontier)

**Approximate Total # of transactions per year:** Click here to enter text.

**Average number of transactions per year by mode of transport:**

**Standard US-Canada Border Release:** Click here to enter text.

**Section 321 Releases (under $800 in value):** Click here to enter text.

**Ocean:** Click here to enter text.

**Air:** Click here to enter text.

**Average # of Tariff Lines per invoice:** Click here to enter text.

**Tariff Database provided?**  Yes  No

If no explain how products will be classified: Click here to enter text.

**List of Potential PGAs:** Click here to enter text.

**Country of origin of goods:** Click here to enter text.

**Peak/Slow Seasons:** Click here to enter text.

**Any additional clearance requirements:**

**Cargo Insurance needed?**  Yes  No

**For ocean shipments: Who will file ISF?** Click here to enter text.

**Arrange cartage:** Click here to enter text.

**Freight payments:** Click here to enter text.

**Prepare delivery order:** Click here to enter text.

**Do the following items apply to the goods you will be importing?**

If ‘Yes’, then commercial invoice price must include the cost of these items:

* **Packing costs:**  Yes  No
* **Buying or Selling commissions:**  Yes  No
* **Assists (items provided FOC or at reduced cost by buyer of merchandise for use in production or sale of the merchandise):**  Yes  No
* **Royalties or licensing fees:**  Yes  No
* **Proceeds of subsequent transactions that accrue to the seller:**  Yes  No
* **Does client take cash (terms) discounts:**  Yes  No
* **Any prepaid freight discounts:**  Yes  No

**Trade Consulting/Compliance**

**Canadian Consulting** **Services** **US Consulting Services**  **Both**

**Monthly Trade Management Services**  **Individual Consulting Services**

**Please Check Individual services that apply:**

Free Trade Agreement Verification  Tariff Database Management

HS Code Classification  Amending entries for duty verification

Canadian Duty Drawback  US Duty Drawback

Post Entry Audits  Amending entries for duty verification

Other: \_\_\_\_\_\_\_\_\_\_\_\_

Other: \_\_\_\_\_\_\_\_\_\_\_\_

Other: \_\_\_\_\_\_\_\_\_\_\_\_

Other: \_\_\_\_\_\_\_\_\_\_\_\_

**TMS Fees:**

**Flat Monthly TMS Fee:** Click here to enter text.

**or**

**Hourly TMS Fee:** Click here to enter text.

**Individual Fees:**

Free Trade Agreement Verification: Click here to enter text.

Tariff Database Management: Click here to enter text.

HS Code Classification: Click here to enter text.

Canadian Duty Drawback: Click here to enter text.

US Duty Drawback: Click here to enter text.

Amending entries for duty verification: Click here to enter text.

Post Entry Audits: Click here to enter text.

Other: \_\_\_\_\_\_\_\_\_\_\_\_

Other: \_\_\_\_\_\_\_\_\_\_\_\_

Other: \_\_\_\_\_\_\_\_\_\_\_\_

Other: \_\_\_\_\_\_\_\_\_\_\_\_

**Are imported goods subject to the following:**

**Free Trade Agreements**  Yes  No

**Anti-Dumping & Countervailing duty deposits**  Yes  No

**Trademarks or copyrights**  Yes  No

**Does the client hold any binding rulings?**  Yes  No

***Additional Notes:*** Click here to enter text.

Transborder Logistics

**Type of Company:**  B2C  B2B

**Direction:**   Northbound  Southbound

**Program:**  Trial period  Full program

**Is Frontier the Broker:**  Yes  No

**Is there client specific SOP:**  Yes  No

**WEBship Login:** Click here to enter text.

**WEBship Password:** Click here to enter text.

**WEBship Functions:**  Rates  Order  Tracking  Proforma

**Small Parcel Terms into Itasca:**  Prepaid  Collect[[2]](#footnote-2)

**LTL Terms into Itasca:**   Prepaid  Collect[[3]](#footnote-3)

**Identify US Carriers if Frontier is picking up Collect LTL :** Click here to enter text.

**Freight Class & NMFC # if available:** Click here to enter text.

**Identify ship schedule:**   NO Consolidation in Itasca  Consolidation (Specify):\_\_\_\_\_\_\_\_\_\_\_

**Routing out of Itasca:**  East  West

**To which location(s) in Canada:** Click here to enter text.

**Will the client require Drop-Shipping (if yes please explain the process):** Click here to enter text.

**Identify Weekly Volume:** Click here to enter text.

**LTL to small parcel ratio:** Click here to enter text.

**Special Requirements:** Click here to enter text.

**IF Frontier is not the Customs Broker, provide contact info:** Click here to enter text.

**Billing Frequency:** ☐ Daily ☐ Weekly ☐ Bi-Weekly ☐ Monthly

**Billing Format:** ☐ Excel ☐ PDF ☐ Both ☐ Consolidated

**\*Note: If choosing Excel spreadsheet, individual PRO#s will show incorrect totals which appear as inaccurate to the client. Consolidated billing format is the best for cross-border consolidations**

**Check All That Applies:**

Delivery Appointments  Power Tail Gate  Hazardous Material

Food Products  Fragile  Residential Deliveries

Inside Deliveries  Construction Site/Storage Facility deliveries

**A1 automated process set up:**  Yes  No

**Separate Leg 1 PFS needed for billing:** Click here to enter text.

**Consolidated order rating in A1:** Click here to enter text.

***Additional Notes:*** Click here to enter text.

Domestic Courier & Logistics

**Please Check All That Applies:**

Local MB Courier  Local SK Courier

Small Parcel Service  Warehousing/Fulfillment

Canadian LTL  Other: Click here to enter text.

**Type of Company:  B2C  B2B**

**Billing Frequency:** ☐ Daily ☐ Weekly ☐ Bi-Weekly ☐ Monthly

**Billing Format:** ☐ Excel ☐ PDF ☐ Both ☐ Consolidated

**\*Note: If choosing Excel spreadsheet, individual PRO#s will show incorrect totals which appear as inaccurate to the client. Consolidated billing format is the best for cross-border consolidations**

Main Pick-Up/Delivery Address: Click here to enter text.

Shipping and Receiving Hours: Click here to enter text.

**Identify Expected Weekly Volume for Each Service:**

* Local MB Courier
  + Parcel: Click here to enter text.
  + LTL: Click here to enter text.
* Local SK Courier
  + Parcel: Click here to enter text.
  + LTL: Click here to enter text.
* Small Parcel Service
  + Parcel: Click here to enter text.
  + LTL: Click here to enter text.
* Canadian LTL
  + Parcel: Click here to enter text.
  + LTL: Click here to enter text.
* Warehousing/Fulfillment
  + Storage Space Needed: Click here to enter text.
  + Parcel: Click here to enter text.
  + LTL: Click here to enter text.

Average Parcel Dimensions: Click here to enter text.

Average LTL Dimensions: Click here to enter text.

**Is there a contract for volume requirements:**  Yes  No

**Method of Dispatch:**  WebSHIP  Courier Complete  Call  Email

**WEBship/Courier Complete Login:** Click here to enter text.

**WEBship/Courier Complete Password:** Click here to enter text.

**Courier Complete ID:** Click here to enter text.

**Check All That Applies:**

Same Day Delivery Required  Tail Gate Delivery Required  Hazardous Material

Food Products  Special Rates/discount levels  Fragile

**Additional Notes**: Click here to enter text.

**International Freight Forwarding**

**Please Check All That Applies:**

US Import IFF  CAD Import IFF

US Export IFF  CAD Export IFF

Ocean  Air

**Identify Approximate number of Shipments per year:**

US Import IFF: Click here to enter text.

Incoterms: Click here to enter text.

Ocean Container Size(s): Click here to enter text.

Air Shipment Size (s): Click here to enter text.

CAD Import IFF: Click here to enter text.

Incoterms: Click here to enter text.

Ocean Container Size(s): Click here to enter text.

Air Shipment Size (s): Click here to enter text.

US Export IFF: Click here to enter text.

Identify to which nation(s): Click here to enter text.

Incoterms: Click here to enter text.

Ocean Container Size(s): Click here to enter text.

Air Shipment Size (s): Click here to enter text.

CAD Export IFF: Click here to enter text.

Identify to which nation(s): Click here to enter text.

Incoterms: Click here to enter text.

Ocean Container Size(s): Click here to enter text.

Air Shipment Size (s): Click here to enter text.

**Agent(s) Details:** Click here to enter text.

**Is Frontier the Broker:**  Yes  No

**If no please provide contact details:** Click here to enter text.

**Any special instructions:** Click here to enter text.

1. A 3% processing fee will apply for each payment, client must call in every time to make a payment [↑](#footnote-ref-1)
2. If Frontier is doing Parcel collect from supplier and bringing to Itasca, include rates/list of locations in excel sheet [↑](#footnote-ref-2)
3. If Frontier is doing LTL collect from supplier and bringing to Itasca, include rates/list of locations in excel sheet [↑](#footnote-ref-3)