**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)