Customer Onboarding Packet

Thank for your interest in X-Rite.

This information packet provides the following information:

X-Rite Finance Requirements for Open Terms

- Complete the information on page 3 of this document. Be sure to include attachments:
    - ACH is our preferred method of payment. If applicable, please attach a copy of your completed ACH form.
    - Your current W-9 form.
    - Tax Exempt Certificates for your ship-to locations.

    NOTE: You may attach a copy of your own credit reference form if you do not fill out page 3 of this document.

- If using a third-party portal, you need to work directly with them to complete your account setup before placing your order with X-Rite.
    - Examples of third-party portals:
        - Ariba
        - Coupa
        - Tungsten
        - Taulia

- Once all the finance requirements are complete, email the information, including attachments, to your Sales Representative and CC Credit@xrite.com. Our Credit Team will begin the new account process.

    NOTE: To prevent delays, do not email this information to Order Management / Customer Service.

- X-Rite Credit Team will notify you once your new account has been created.

Customer Data Form

Company Name: Click or tap here to enter text.
D&B Number: Click or tap here to enter text.
Tax Exemption Certificate(s): Yes ☐ No ☐
If tax exempt, attach a copy of your tax-exempt certificate(s) for the state(s) product will ship to. Please sign, date and issue to X-Rite.

BILL TO ADDRESS

Name: Click or tap here to enter text.
Address: Click or tap here to enter text.
City/ZIP-Postal: Click or tap here to enter text.
Country: Click or tap here to enter text.

SHIP TO ADDRESS

Name: Click or tap here to enter text.
Address: Click or tap here to enter text.
City/ZIP-Postal: Click or tap here to enter text.
Country: Click or tap here to enter text.

CUSTOMER CONTACT INFORMATION

	Buyer	Accounts Payable
Name:	Click or tap here to enter text.	Click or tap here to enter text.
Telephone #:	Click or tap here to enter text.	Click or tap here to enter text.
Email Address:	Click or tap here to enter text.	Click or tap here to enter text.
Customer Portal:	Click or tap here to enter text.	Click or tap here to enter text.

(For Invoicing or Email to receive invoices electronically)

TRADE REFERENCES:

	Trade Reference 1	Trade Reference 2
Company Name:	Click or tap here to enter text.	Click or tap here to enter text.
Contact Name:	Click or tap here to enter text.	Click or tap here to enter text.
Address:	Click or tap here to enter text.	Click or tap here to enter text.
City/Zip Postal:	Click or tap here to enter text.	Click or tap here to enter text.
Country:	Click or tap here to enter text.	Click or tap here to enter text.
Email Address:	Click or tap here to enter text.	Click or tap here to enter text.
Telephone #:	Click or tap here to enter text.	Click or tap here to enter text.

NOTICE TO CUSTOMERS:

- **Please return this completed form to your X-Rite Sales Representative.**
- Open account terms may be provided dependent upon a review by the X-Rite Credit Department. Please attach trade references. **Standard Terms are Net 30 days**. Any terms outside of this must be approved by the X-Rite Credit Department prior to acceptance of an order.

CREDIT CARD CUSTOMERS ONLY

Customer Data Form

Company Name: Click or tap here to enter text.

Tax Exemption Certificate(s): Yes ☐ No ☐

If tax exempt, attach a copy of your tax-exempt certificate(s) for the state(s) product will ship to. Please sign, date and issue to X-Rite.

BILL TO ADDRESS

Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

City/ZIP-Postal: Click or tap here to enter text.

Country: Click or tap here to enter text.

SHIP TO ADDRESS

Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

City/ZIP-Postal: Click or tap here to enter text.

Country: Click or tap here to enter text.

CUSTOMER CONTACT INFORMATION

	Buyer	Accounts Payable
Name:	Click or tap here to enter text.	Click or tap here to enter text.
Telephone #:	Click or tap here to enter text.	Click or tap here to enter text.
Email Address:	Click or tap here to enter text.	Click or tap here to enter text.

NOTICE TO CUSTOMERS:

Please return this completed form to your X-Rite Sales Representative

VENDOR & PAYMENT OPTIONS

X-Rite Incorporated, 4300 44th ST SE Grand Rapids MI 49512 USA 1-800-248-9748

VENDOR INFORMATION X-RITE INCORPORATED

D-U-N-S® Number: 00-602-6553
Employer Identification (TIN): 38-1737300
GST Number: 89892 1473 RT0001

PAYMENT PROCESSING INFORMATION

Check Payments

X-Rite Incorporated
Lockbox 62750
62750 Collection Center Drive
Chicago, Illinois 60693-0627

ACH Payment

Bank of America
1401 Elm Street 2nd Floor
Dallas, Texas 75202
ACH/ABA Routing Number: 071923284
Account Number: 8765030744
Account Type: Checking
CTX Format

Wire Transfer

Swift: BOFAUS3N
222 Broadway
New York, NY 10038
Bank of America
Routing Number: 026009593
Account Number: 8765030744

Remittance Email:

Accountsreceivable@xrite.com and credit@xrite.com

X-Rite W-9

Form **W-9**
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See *Specific Instructions* on page 3.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

X-RITE INCORPORATED

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☑ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . .

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . ☐

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) 5

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) E

(Applies to accounts maintained outside the United States.)

5 Address (number, street, and apt. or suite no.). See instructions.

4300 44TH STREET SE

Requester's name and address (optional)

6 City, state, and ZIP code

GRAND RAPIDS, MICHIGAN 49512-4009

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

[ ][ ][ ] – [ ][ ] – [ ][ ][ ][ ]

or

Employer identification number

3 8 – 1 7 3 7 3 0 0

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here | **Signature of U.S. person** Sonny Breen | **Date** JANUARY 2, 2025

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

Cat. No. 10231X Form **W-9** (Rev. 3-2024)

Purchase Order Requirements

- **To prevent delays** when submitting your orders, please include all the required information below on your Purchase Orders.
- If your PO system cannot provide all the detailed information below, it must be included in the body of the email you submit when placing an order.
- Email your orders/POs to your Sales Representative.

Check	PO REQUIREMENTS
________	X-Rite Vendor/Supplier on Purchase Order *(X-Rite, Inc., 4300 44th Street SE, Grand Rapids, MI 49512)*
________	PO Number
________	Bill-To Name, Address
________	Ship-To Name, Address, Contact Name & Email
________	Email to receive Order & Shipping Confirmations
________	Payment Terms *(Net 30, Credit Card, Check, Wire Transfer)*
________	FOB *(Shipping Point or Customer Site)*
________	Ship Method *(X-Rite uses FedEx or use your freight account including your account #)*
________	Freight Terms *(Prepay-Add, Prepay, Collect when using your freight account)*
________	Inco Terms *(EXW, FOB Destination, etc.)*
________	Quantity for item(s) ordered
________	Price for item(s) ordered
________	Part Number for item(s) ordered *(include below if applicable)*: – Product configuration selections – Software End User Contact Name/Email info – Software Renewal Model(s) & Serial Number(s) – Software Pantone Live, # of seats
________	Tax Exempt Form for ship-to location if not already submitted to X-Rite

If the following shipping information does not appear on your PO (or email) for orders shipping to the USA or Canada, **X-Rite will default to the following terms**:

USA

Information:	Order will default to:
FOB:	Shipping Point
Ship Method:	FedEx-Parcel-Ground
Freight Terms:	Prepay & Add
Inco Terms:	EXW

CANADA

Information:	Order will default to:
FOB:	Shipping Point
Ship Method:	FedEx-Parcel-International Export Economy
Freight Terms:	Prepay
Inco Terms:	DDP