



Dear New Customer:

As the owner of J.M. Walsh Oil, please allow me to introduce you to our company. For over 35 years now, we have been serving Cape Ann's heating needs as a family owner and operated, full-service company. We are fully insured, including extensive pollution coverage through a specialized fuel insurance program. Some of the money saving services we can offer you are:

- * Automatic Delivery
- * Installation of Heating/Cooling Equipment
- * Service/Install Hot Water Heaters
- * Budget Plans
- * Radiant Heating
- * 24-Hour Emergency Service
- * Customer Referral Rewards
- * Fuel Assistance
- * Service Contracts
- * Senior Citizen Discount

Please download a New Account form and a Credit Application, which are required to open an account with us. Upon credit approval, you will have 7 days from the delivery date to remit full payment at the discounted price. The delivery invoice is your bill. After 7 days, the price increases by .30¢ per gallon. If you prefer to pay on a C.O.D. basis or budget plan you will receive the discount at the time of delivery.

Also available for download is a Credit Card Authorization, if you would like to authorize automatic payments on your credit card at the time of delivery to ensure that you receive the Prompt Pay Discount.

As a full-service company, we also offer Service Contracts to our customers. Information on cost and eligibility for your specific system will be available after an inspection. The sample Service Contract, available for download, outlines the program's covered parts and services.

Please feel free to call if there are any questions, and don't forget to inquire about our customer referral reward. You could start earning your first \$50.00 today!

Sincerely,

Janelle L. Favaloro
President
J.M. Walsh Oil Company Inc.
jmwalshoil.com



CONSUMER CREDIT APPLICATION

INDIVIDUAL ACCOUNT

Applicant is relying on his/her income assets and credit references. Please complete section 1, sign and date. You may apply for an individual account even if you are married. However, if your spouse will use this account, please print their full name below.

ACCOUNT ON THE BEHALF OF ANOTHER

If you are relying on another person's income, assets and credit references, please complete section 2 for the other person and section 1 for yourself.

Note: Alimony and child support do not need to be disclosed as income

Spouse First Middle Last Name

1 INDIVIDUAL INFORMATION (ALL APPLICANTS)							YOUR SS#	DATE OF BIRTH
YOUR NAME	FIRST	INITIAL	LAST				PHONE #	
PRESENT ADDRESS	STREET	CITY	STATE	ZIP	HOW LONG? YRS	MOS	MOBILE #	
PREVIOUS ADDRESS	STREET	CITY	STATE	ZIP	HOW LONG? YRS	MOS	OWNER <input type="checkbox"/> TENANT NUMBER OF DEPENDENTS	
YOUR EMPLOYER			POSITION				HOW LONG? YRS	
EMPLOYER'S ADDRESS	STREET	CITY	STATE	ZIP			EMPLOYER'S PHONE #	
MONTHLY INCOME BEFORE DEDUCTIONS	\$				MONTHLY ALIMONY CHILD SUPPORT OR SEPARATE MAINTENANCE PAYMENTS (SEE NOTE ABOVE)	\$		
NEAREST RELATIVE NOT LIVING WITH YOU	NAME		ADDRESS				PHONE #	

2 ACCOUNT ON THE BEHALF OF ANOTHER							THEIR SS #	DATE OF BIRTH
THEIR NAME	FIRST	INITIAL	LAST				PHONE #	
THEIR PRESENT ADDRESS	STREET	CITY	STATE	ZIP	HOW LONG? YRS	MOS	MOBILE #	
THEIR PREVIOUS ADDRESS	STREET	CITY	STATE	ZIP	HOW LONG? YRS	MOS	OWNER <input type="checkbox"/> TENANT NUMBER OF DEPENDENTS	
THEIR EMPLOYER			POSITION				HOW LONG? YRS	
THEIR EMPLOYER'S ADDRESS	STREET	CITY	STATE	ZIP			THEIR EMPLOYER'S PHONE #	
THEIR MONTHLY INCOME BEFORE DEDUCTIONS	\$				THEIR MONTHLY ALIMONY CHILD SUPPORT OR SEPARATE MAINTENANCE PAYMENTS (SEE NOTE ABOVE)	\$		
THEIR NEAREST RELATIVE NOT LIVING WITH THEM	NAME		ADDRESS				PHONE #	

MAY YOUR CREDIT REFERENCES AND HISTORY BE VERIFIED IN ANY OTHER NAME? NO YES _____

OFFICE USE ONLY:

CREDIT APPROVED – LIMIT \$ _____

CREDIT NOT APPROVED

I confirm that the information set forth is complete and accurate
 I authorize **J.M. Walsh Oil Company** to substantiate and investigate the information contained on the application. Terms of credit will be set forth on a separate agreement to be forwarded if credit is authorized.

Signature _____ Date _____



New Account Form

Customer Name:	Email:
Customer Name:	Email:
Billing Address:	Billing Phone Number:
	Mobile Phone Number:
Automatic Delivery? <input type="checkbox"/>	Owner <input type="checkbox"/> Tenant <input type="checkbox"/>
Automatic Credit Card Payment? <input type="checkbox"/>	Senior Citizen (65+) <input type="checkbox"/> Mass Energy <input type="checkbox"/>

Delivery Address:	Description of House/Business:
	Location of fill pipe:
Special Delivery Instructions:	Do you have any other means of heat?
	How do you heat your hot water?
Location to leave delivery invoice?	Estimate of oil used annually: _____ gallons




Tank	Burner
Oil tank size?	Brand name of equipment:
Age of tank?	Age of equipment?
Date of last inspection?	Date of last cleaning?
How full is tank now?	

Do have any special concerns?
Are you interested in a Service Plan?
How did you hear of our company?
Previous oil company?



Credit Card Authorization

In an effort to better serve our clients and simplify your billing experience, we offer credit card acceptance. Charge card information is filed with your confidential information and kept secure.

OPTIONS	<p>_____ (initial) I hereby give J.M. Walsh Oil Company, Inc. permission to process the agreed upon Budget Payment automatically on the first of each month.</p> <p>_____ (initial) I hereby give J.M. Walsh Oil Company, Inc. permission to process amounts due for services rendered at the time of service.</p> <p>_____ (initial) I hereby give J.M. Walsh Oil Company, Inc. permission to process amounts due for oil delivered at the time of delivery.</p> <p>_____ (initial) I hereby give J.M. Walsh Oil Company, Inc. permission to process Service Contract Payments when due.</p>
IONINFORMATPAYMENT	<p>Customer Name: _____</p> <p>Billing Address: _____</p> <p>_____</p> <p>_____</p> <p>Type of Card: _____</p> <div style="display: flex; justify-content: space-around; align-items: center;">    </div> <p>Card Number: _____</p> <p>Expiration Date: _____ Security Code: _____</p> <p>The undersigned guarantees performance of the financial provisions of this agreement.</p> <p>Card Holder Name: _____</p> <p>Signature of Card Holder: _____ Date: _____</p>
POLICY CHARGE	<p>_____ (initial) Being the authorized cardholder or the Corporate Officer, by signing above I understand and agree to the terms set forth in this agreement, agree to pay, and specifically authorize to charge my credit card for deliveries made and services provided. I further agree that in the event my credit card becomes invalid, I will provide a new valid credit card upon request, to be charged for the payment of any outstanding balances owed. I understand that this agreement will remain in place until I notify J.M. Walsh Oil Company, Inc. in writing that I wish to cancel the agreement and the following conditions have been met: 1. All balances due are satisfied. 2. All deliveries, service, installation policies are met.</p> <p>_____ (initial) Charges made for actual services performed, deliveries made, and equipment installed by J.M. Walsh Oil Company, Inc. are non-refundable.</p>