



Application Instructions

This application is required for participation in InvestSmart Business Energy Upgrades for Custom projects with qualifying measures not found in the Lighting or Standard Programs. Complete participation information and eligibility specifications are included in the Customer Participation Manual, also available at jea.com/investsmart.

This application packet contains the following forms:

- General Information
• Building Information
• Rebate Payment Information
• Rebate Worksheet
• Program Agreement

To participate in InvestSmart Business Energy Upgrades, please review the following steps:

1. Read the Customer Participation Manual for a complete description of program eligibility requirements and the participation process.
2. Read the Terms and Conditions found online at jea.com/investsmart.
3. Complete the following forms included with this Rebate Application:
• General Information - Include all required customer and account information.
• Building Information - Include the facility type and operational characteristics to which the energy efficiency measure(s) will be applied.
• Rebate Payment Information - Rebates will be mailed to customer's electric account billing address. If the customer would prefer the check to be designated to someone other than the customer, complete the Payment Release Information.
• Rebate Worksheet - Include all required information including: savings calculations, supplemental documentation, and eligible project costs.
4. Purchase and Install qualifying equipment after receiving written approval from JEA. Equipment and measure eligibility is listed in the Equipment Catalog and in the Customer Participation Manual, available at jea.com/investsmart.
5. Notify JEA of the completed project by submitting a Custom Installation Notice available for download at jea.com/investsmart.
6. Retain a copy of all completed application forms and all required documentation, such as invoices and product specifications. Submitted applications will become the property of JEA.
7. Application forms and required documentation may be submitted by email to jeaeficiencyrebates@bYI Ubhcom.

For more information contact us at:

InvestSmart Business Energy Upgrades
6620 Southpoint Drive South, Suite 630
Jacksonville, FL 32216

Online: jea.com/investsmart | Phone: (888) 345-4609 | Email: jeaeficiencyrebates@bYI Ubhcom

General Information

Important: Please allow 4-6 weeks for your application processing following complete documentation submittal. Written approval by JEA for Custom measures rebates is required prior to equipment purchase and installation. Rebates will not be paid for ineligible or incomplete applications.

Business Name (as it appears on JEA Bill) Federal Tax ID (EIN) (Must be 9 digits)

JEA Account Number(s) where measure(s) to be installed

Address where measure(s) to be installed City State Zip

Contact Name Phone Number Fax Number Email

Contact Address (if different from the installation address) City State Zip

Business Classification (Check ONE. Required for all businesses, including non-profits):

- Individual/sole proprietor Corporation Partnership LLC Exempt Other (please describe): _____

Rebate Worksheet

Important: This form is to be completed and submitted as part of the Custom Application. Attach additional sheets as necessary.

Parameter	Measure 1	Measure 2	Measure 3
Project type (Retrofit or New Construction)			
Estimated Installation Date			
Dealer/Contractor Name			
Energy Efficiency Measure (type and description)			
Estimated baseline usage (kWh/yr)			
Estimated post-retrofit use (kWh/yr)			
Estimated savings (kWh/yr)			
Estimated annual operating hours			
Estimated installation costs (\$)			
Estimated rebate			
Measure Rebate (\$) (e.g. HVAC: \$50/ton x 10 tons = \$500)			
Number of Measures			
Total Rebate (\$) (# of Measures x Measure Rebate)	\$	\$	\$

For each energy efficiency measure listed, please list all assumptions and show all formulas used to calculate the estimated energy savings. In addition, please provide descriptions of all variables used in these formulas and example calculations for each measure. Please attach copies of site plans identifying the location of each identified energy efficiency measure. For alterations to mechanical or electrical systems, one line schematic drawings are required. Drawings shall include existing and post-retrofit conditions clearly outlining the scope of work. Please attach documentation detailing eligible project costs. Electronic copies of all files, spreadsheets, or computer simulation input files should be included with this application.

Please list contractors/vendors used _____
for the installation of this project: _____

Application Checklist:

Before submitting this application please verify the following:

- Did you read and understand the eligibility requirements in the Equipment Catalog?
- Have you included a dated sales invoice?
- Did you attach any additional documentation listed in the Equipment Catalog?
- Did you include your account number?
- Did you sign the Terms and Conditions Form?

Custom Program Agreement

This Custom Program Agreement sets forth the participation requirements for customers applying for rebates through the InvestSmart Business Energy Upgrades Custom Program (“Program”). By signing below, the customer named in the application (“Customer”) is agreeing to comply with and be bound by these terms.

Program Participation Steps: Customers interested in participating in the Program may or may not utilize a Program approved JEA contractor (“Trade Ally”) to perform the installation of eligible measures. A list of Program approved Trade Ally contractors is available at JEA.com/investsmart.

To be considered for rebates offered by the Program, Customer must submit a fully completed InvestSmart Business Energy Upgrades Custom Program Application, applicable attachments, and required measure documentation (“Rebate Application”), incorporated herein by reference, prior to purchasing or installing any energy efficiency equipment. Upon receipt of all required documentation from Customer and completion of any pre-inspections at the Facility, JEA will review Customer’s Application and issue Customer a preapproval notice including the preapproved rebate amount. As part of the Rebate Application review process, JEA may conduct site inspection activities necessary to confirm the baseline conditions and anticipated project scope. Customer acknowledges that JEA calculates rebate amounts utilizing the project-specific data which Customer has provided on this Rebate Application and that implementation rebates for similar measures may vary from customer to customer based upon specific costs and savings. Failure to provide or complete any of the requested information or program requirements may result in the return of the Rebate Application.

Program Funding: Program funds are limited and rebates are subject to funding availability. Rebate applications are accepted on a first-come, first-served basis until the conclusion of the Program term, or until Program funds are no longer available, whichever occurs first.

Terms and Conditions: This Program Agreement incorporates by reference the JEA General Terms and Conditions (“General Terms and Conditions”) located at JEA.com/investsmart. The General Terms and Conditions set forth additional terms governing Customer’s participation in the Program including but not limited to limiting the liability of JEA and the Program Administrator, establishing the laws that govern this Program Agreement, and the process for disputes.

Customer Authorizations

Select if Trade Ally will submit documentation on behalf of Customer

As the Customer Representative, I acknowledge the following:

I have selected the below named Trade Ally for the installation of energy efficiency measures at the Facility listed in this Rebate Application and upon approval of the project, if required, Trade Ally is authorized to submit the required documentation on my behalf for the application of rebates applicable to my project through the Program. I understand that 1) JEA and Program Administrator make no warranty or representation about the Trade Ally’s qualifications 2) I am solely responsible for selecting the Trade Ally to implement the project on my behalf; 3) the Trade Ally is an independent contractor and is not authorized to make any representations on behalf of JEA or Program Administrator; and 4) that JEA and Program Administrator will have no role in resolving any disputes between me and the Trade Ally and/or any other third parties.

Select to release the rebate payment to the third party listed below.

I AUTHORIZE JEA/PROGRAM ADMINISTRATOR TO ISSUE THE REBATE PAYMENT TO THE THIRD PARTY NAMED BELOW AND I UNDERSTAND THAT I WILL NOT BE RECEIVING THE REBATE PAYMENT CHECK FROM THE PROGRAM. I ALSO UNDERSTAND THAT MY RELEASE OF PAYMENT TO THE THIRD PARTY DOES NOT EXEMPT ME FROM THE REBATE REQUIREMENTS OUTLINED IN THE PROGRAM TERMS AND CONDITIONS. I ALSO ACKNOWLEDGE THAT ASSIGNMENT OF APPLICABLE REBATES TO ANOTHER PARTY MAY NOT AFFECT MY TAX LIABILITY FOR REBATES PAID BY THE PROGRAM.

Payee: Business Name	Contact Phone Number
Payee Mailing Address	City
	State
	Zip

Signatures

By signing below, I, the Customer Representative (and Trade Ally, if applicable) certify that:

1. I have the authority to enter into this Agreement;
2. I have read, understand, and agree to be bound by and comply with the terms set forth in this Program Agreement and such other terms as set forth in the JEA General Terms and Conditions;
3. The information provided to JEA or Program Administrator in and as part of the Rebate Application or Lighting Workbook is true and correct and I will notify JEA immediately of any changes to the information.
4. I understand and agree that the project meets all eligibility requirements for which I am applying and JEA reserves the right to request additional information to verify Customer's eligibility.
5. If I have acquired a rebate payment on the basis of an inaccurate or fraudulent application or if I mistakenly receive an amount greater than I was authorized to receive, I will refund the money back to JEA.

By signing below, Customer authorizes the selections made in the Authorizations above, if any.

Customer Representative Printed Name	Signature	Title	Date
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Trade Ally Representative Printed Name	Signature	Title	Date
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Under penalties of perjury, I certify that:

- 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
- 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
- I am a U.S. citizen or other U.S. person, andThe FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct

Customer Representative Printed Name	Signature	Title
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