

Standard Equipment Incentives

Existing Multifamily | Incentive Application | Form 320P



To be completed by Participant

Lockheed Martin Corporation is a Program Management Contractor for Energy Trust of Oregon.

Who can apply:

Incentives are available for new, qualifying natural gas and electric energy-saving equipment installed at an existing multifamily property in the State of Oregon. Electric customers of Portland General Electric or Pacific Power can apply for incentives for qualifying electric equipment, and natural gas customers (on qualifying rate schedules) of NW Natural, Cascade Natural Gas or Avista can apply for incentives for qualifying natural gas equipment. Additional requirements apply; see Terms and Conditions for details.

Steps to completion:

- 1 Install** an eligible energy efficiency improvement.
- 2 Complete** application information and provide required supporting documentation, including:
 - o W9 for payee
 - o Invoice(s) for product and installation
 - o Manufacturer spec sheet
- 3 Submit** form by fax, email or mail along with supporting documentation to:
Energy Trust of Oregon Existing Multifamily Program
 811 SW 6th Avenue, Suite 800
 Portland, OR 97204
 1.877.510.2130 phone
 503.243.1154 fax
multifamily@energytrust.org
- 4 Receive** your check.
 Please allow six to eight weeks for incentive processing after completed application and supporting documentation are received. A post-installation verification may be required prior to payment. Such verification is always required for self-installed projects.

What you need-to-know:

- Energy Trust must receive applications within 90 days from the date of purchase and installation (on invoice(s)).
- All information must be completed for processing; incomplete information will result in delayed payment or disqualification of the incentive.
- If you want to assign your incentive to your trade ally/contractor or another payee, complete the Option to Assign Payment section located on page 7.

Energy Trust Use Only	Project ID	PT ID	Promo Code (Optional)
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Other Multifamily Incentive Applications

- Use **Form 320W** for Existing Multifamily Weatherization Upgrades

Participant Information (Property Owner)			<input type="checkbox"/> Payee
Legal Name of Property Owner			(the "Participant")
Contact Name		Title	
Mailing Address			
City		State	Zip
Phone		<input type="checkbox"/> Work <input type="checkbox"/> Cell	Email
Property Ownership	<input type="checkbox"/> Investment Owner	<input type="checkbox"/> Individual Unit Owner	Occupied by <input type="checkbox"/> Owner <input type="checkbox"/> Tenant
Is this property used for rental income? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If you checked Yes, a W-9 is required for payment.</i>			

Building Representative (Property Manager, HOA Representative, etc.) Skip this section if you marked Individual Unit Owner above			
Company Name			
Contact Name		Title	
Mailing Address			
City		State	Zip
Phone		<input type="checkbox"/> Work <input type="checkbox"/> Cell	Email

Property Information			
Property Name			
Address			
City		State	Zip
Total Number of Buildings	Total Number of Units	Number of Levels of Bldg	
Year Built	Total Sq. Ft. of Buildings or Individual Unit		
Market	<input type="checkbox"/> Affordable Housing	<input type="checkbox"/> Campus Living	<input type="checkbox"/> Assisted Living/Retirement
	<input type="checkbox"/> Market Rate	<input type="checkbox"/> HOA	<input type="checkbox"/> Individual Unit Owner
Building Style	<input type="checkbox"/> Low-Rise (1-3 stories)	<input type="checkbox"/> Duplex	
	<input type="checkbox"/> Mid-Rise (4-8 stories)	<input type="checkbox"/> Triplex	
	<input type="checkbox"/> High-Rise (9 or more stories)	<input type="checkbox"/> Fourplex	
	<input type="checkbox"/> Townhouse/Rowhouse	<input type="checkbox"/> Other (specify) _____	
Electric Utility	<input type="checkbox"/> PGE	Gas Utility	<input type="checkbox"/> NW Natural
	<input type="checkbox"/> Pacific Power		<input type="checkbox"/> Cascade Natural Gas
	<input type="checkbox"/> Other _____		<input type="checkbox"/> Avista
			<input type="checkbox"/> None

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Space Heating (check all that apply)			
Tenant Space Heating Fuel <input type="checkbox"/> Electric <input type="checkbox"/> Gas			
If Electric, Type of System		If Gas, Type of System	
<input type="checkbox"/> Heat Pump	<input type="checkbox"/> Furnace	<input type="checkbox"/> Central Boiler	
<input type="checkbox"/> Baseboard	<input type="checkbox"/> Wall Heater	<input type="checkbox"/> Furnace	
<input type="checkbox"/> Package Terminal Heat Pump	<input type="checkbox"/> Other (specify) _____	<input type="checkbox"/> Other (specify) _____	
Water Heating (check all that apply)			
<input type="checkbox"/> Electric	<input type="checkbox"/> Central Boiler	Laundry Water Heating	<input type="checkbox"/> Electric
<input type="checkbox"/> Gas	<input type="checkbox"/> Storage Tank	<input type="checkbox"/> Gas	Pool Water Heating
	<input type="checkbox"/> Tankless		<input type="checkbox"/> Gas
			<input type="checkbox"/> Other (specify) _____

Properties applying for cash incentives for heating must have space heating provided by a participating utility and properties applying for incentives for water heaters or clothes washers must have water heating provided by a participating utility.

Gas Heating Incentives							
<input type="checkbox"/> Gas Furnace (\$300) 90% AFUE or greater; this incentive is only available for furnaces used as a primary heat source, not as back-up heat source. Only side-by-side attached dwelling units and duplex, triplex or fourplex units are eligible.							
<input type="checkbox"/> Condensing Gas Furnace - stacked structures with five or more units only Natural Gas Furnace of less than 225,000 Btu/h input capacity. Qualification based on Thermal Efficiency (TE). If TE is not provided AFUE may be used. Must serve multiple units, or serve a common area. Offices are not considered common areas.							
<input type="checkbox"/> \$1.50 per kBtu/h; Min 91% <input type="checkbox"/> \$2.00 per kBtu/h; Min 95% <input type="checkbox"/> \$3.00 per kBtu/h; Min 98%							
<input type="checkbox"/> High-Efficiency Condensing Boiler w/ Electronic Ignition							
<input type="checkbox"/> \$10 per kBtu/h; < 300 kBtu/h, Min 94% AFUE <input type="checkbox"/> \$9 per kBtu/h; 300 kBtu/h to 2500 kBtu/h, Min 94% Thermal Efficiency <input type="checkbox"/> \$8 per kBtu/h; >2500 kBtu/h, Min 94% Combustion Efficiency							
Manufacturer	Model	Efficiency Rating	kBtu/h Input	Primary Heat Source	Installed Cost	Qty	Incentive Requested
					\$		\$
					\$		\$
					\$		\$

Thermostatic Radiator Valves (TRVs) – gas-fired central hydronic or steam systems only						<input type="checkbox"/> \$100 per TRV
Replace manual, non-thermostatically controlled valves at dwelling unit radiators						
Steam Traps - low-pressure (< 15 psig) systems only						<input type="checkbox"/> \$100 per trap
Repair/replace failed open steam traps						
Manufacturer	Model	Equipment Replaced (Equip. Manufact./Model if known)	Installed Cost	Qty	Incentive Requested	
			\$		\$	
			\$		\$	

Fireplace Incentives						
High-efficiency Direct-vent Gas Fireplace - Must be 70% Fireplace Efficiency (FE) or greater, have an intermittent pilot ignition, be vented to the outside with sealed combustion, and be on Energy Trust's qualified models list.*						
Only side-by-side attached dwelling units and duplex, triplex or fourplex units are eligible.						
<input type="checkbox"/> \$150 FE 70% - 74.9% <input type="checkbox"/> \$250 FE 75% or greater						
Manufacturer	Model	FE %	Installed Cost	Qty	Incentive Requested	
			\$		\$	

* See Energy Trust's list of qualifying models at <https://www.energytrust.org/gasfireplaces>

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Package Terminal Heat Pump (PTHP) Incentives

Replacement of electric furnace or electric resistance heat (baseboard, in-wall unit or internal heater of PTAC), must be on the AHRI PTHP qualified list (www.ahridirectory.org) \$200 per unit

Manufacturer	Model	Equipment Replaced (Equip. Manufact./Model if known)	Installed Cost	Qty	Incentive Requested
			\$		\$
			\$		\$

Ductless Heat Pump (DHP) Incentives

Ductless Heat Pump - Replace electric resistance heat (electric furnace, electric baseboard or in-wall unit) with installation of inverter-driven model and HSPF of 9.0 or greater. DHP must have a 5-year minimum compressor warranty. \$800 per outdoor unit

Manufacturer	Model	Equipment Replaced	Capacity (Tons)	# of Indoor Units	Installed Cost	Qty	Incentive Requested
					\$		\$
					\$		\$

Ducted Heat Pump Incentives

Side-by-Side attached dwelling units and Duplex, Triplex and Fourplex properties only

Ducted Heat Pump: must replace electric forced air furnace or electric resistance heat, 8.5 HSPF or greater \$700

Manufacturer	Model	HSPF	Equipment Replaced	Installed Cost	Qty	Incentive Requested
				\$		\$

Heat Pump Advanced Controls

Add a qualifying thermostat* to an existing or new ducted heat pump programmed with a 35°F lockout. Thermostat must either be web-enabled or utilize an outdoor temperature sensor. Heat pump must have electric auxiliary heat source. Must be contractor installed. Cannot be combined with smart thermostat incentive. \$250

*See qualifying models at <https://www.energytrust.org/heatpumpcontrols>

Thermostat	Manufacturer	Model	Lockout Temp °F	Installed Cost \$	Incentive Requested \$
Controls installed on: <input type="checkbox"/> New Heat Pump <input type="checkbox"/> Existing Heat Pump			Auxiliary Heat Source Fuel: <input type="checkbox"/> Electric <input type="checkbox"/> Gas <input type="checkbox"/> Other		

Web-enabled Thermostat Incentive

Smart Thermostat (\$50 per thermostat); Must be a web-enabled thermostat. See qualifying models at <https://www.energytrust.org/incentives/multifamily-smart-thermostat>. Home must be heated with fuel provided by a participating Energy Trust utility.

Manufacturer	Model	Installed Cost	Qty	Incentive Requested
		\$		\$

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New Rooftop Unit (RTU) with Manufacturer-Installed Advanced Controls Incentives					
For the installation of new rooftop units with direct expansion cooling and either gas furnace or heat pump heating					
<input type="checkbox"/> RTU with Economizer* (\$30 per ton); cooling capacity less than 54,000 Btu/h			<input type="checkbox"/> Gas Heating <input type="checkbox"/> Heat Pump Heating		
Manufacturer	Model	Size (tons)	Installed Cost	Qty	Incentive Requested
			\$		\$
<input type="checkbox"/> RTU with Demand Control Ventilation** (DCV) (\$29 per ton); must have Economizer and must serve spaces not required by code to have DCV			<input type="checkbox"/> Gas Heating <input type="checkbox"/> Heat Pump Heating		
Manufacturer	Model	Size (tons)	Installed Cost	Qty	Incentive Requested
			\$		\$
Space or area that the RTU will serve					
<input type="checkbox"/> RTU with Variable Frequency Drive* (VFD) (\$100 per ton); must have both DCV and Economizer, must have both cooling capacities less than 110,000 Btu/h and supply fan motor less than 10 horsepower			<input type="checkbox"/> Gas Heating <input type="checkbox"/> Heat Pump Heating		
Manufacturer	Model	Size (tons)	Installed Cost	Qty	Incentive Requested
			\$		\$

* The site's electricity must be provided by PGE or Pacific Power

** The site's heating fuel must be provided by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista.

Appliance Incentives						
<input type="checkbox"/> ENERGY STAR Refrigerator (\$35 per unit); Must be 14.3 to 20.5 cubic feet, with a top freezer, no through-the-door ice, and must be "active" on ENERGY STAR certified list. Visit http://www.energystar.gov/productfinder/product/certified-residential-refrigerators/results						
Manufacturer	Model	Installed Cost	Qty	Incentive Requested		
		\$		\$		
		\$		\$		
Clothes Washer						
<input type="checkbox"/> Commercial Front-Loading Clothes Washer,* Electric or Gas DHW (\$300 per unit); Modified Energy Factor (MEF) 2.2 or greater and Water Factor (WF) 4.5 or lower.						
<input type="checkbox"/> In-Unit Residential Front-Loading Clothes Washer,** Electric or Gas DHW (\$120 per unit); Integrated Modified Energy Factor (IMEF) 2.38 or greater, and at least 2.5 cubic feet tub capacity						
Manufacturer	Model	Energy Factor (MEF or IMEF)	Water Factor	Installed Cost	Qty	Incentive Requested
						\$
						\$

* Additional requirements for Commercial Clothes Washer, Electric or Gas DHW. To qualify for an incentive:

- The site must have water heating provided by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista, and the site's electricity must be provided by PGE or Pacific Power.
- The commercial washer must be used in a common area.
- If leased, the lease term must be 7 years or longer. A signed lease agreement and documentation that identifies washer quantity, model number(s), and purchase/installation cost are required.

** Additional requirements for In-Unit Residential Clothes Washer, Electric or Gas DHW. To qualify for an incentive:

- The site must have water heating provided by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista.

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Bath Fan Incentives					
Replace inefficient bath fan that has a light to a high-efficiency bath fan. <input type="checkbox"/> \$20 per unit without light High-efficiency bath fan without a light - Fan must have an efficacy of 5.3 CFM/W (cubic ft per minute per watt) or higher and be ENERGY STAR approved*.					
High-efficiency bath fan with light - Must meet same requirements as above, and have a CFL with GU-24 socket or LED light ≤ 26W.* <input type="checkbox"/> \$50 per unit with light					
Manufacturer	Model Number	Efficacy (CFM/W)	Installed Cost	Qty	Incentive Requested
			\$		\$
			\$		\$

* To see a list of qualifying bath fans (must be 5.3 CFM/W or higher) visit the ENERGY STAR website at <http://www.energystar.gov/productfinder/product/certified-ventilating-fans/results>

Water Heating Incentives						
Electric – All property types <input type="checkbox"/> Tier 1 Heat Pump Water Heater (\$150 per unit) – Qualifying models* must meet Northwest Energy Efficiency Alliance’s (NEEA) Advanced Water Heater Specification compliance; tank must be less than 55 gallons. <input type="checkbox"/> Tier 2, 3, 4 or 5 Heat Pump Water Heater (\$500 per unit) – Qualifying models* must meet NEEA’s Advanced Water Heater Specification compliance; tier 2 must be less than 55 gallons, tier 3, 4 or 5 may be any size. * See a list of qualifying models at https://energytrust.org/heatpumpwaterheaters						
Gas – Side-by-Side attached dwelling units and Duplex, Triplex and Fourplex properties only <input type="checkbox"/> High-Efficiency Water Heater (\$100 per unit) - ENERGY STAR® certified. Hybrid and tankless models do not qualify.						
Gas – Stacked structures with five or more units only <input type="checkbox"/> Condensing Tankless Water Heater (\$300 per unit) - EF 0.94 or greater, input of less than 200 kBtu/h and supply hot water to multiple units.						
Gas – All property types <input type="checkbox"/> Commercial Tank Water Heater (\$4.00 per kBtu/h) - 91% or greater thermal efficiency. <input type="checkbox"/> Commercial Condensing Tankless Water Heater (\$2.75 per kBtu/h) - 94% or greater thermal efficiency, electronic ignition and input of 200 kBtu/h or greater.						
Manufacturer	Model	Efficiency Rating (Thermal efficiency)	Tank Size or kBtu/h	Installed Cost	Qty	Incentive Requested
						\$
						\$
Gas - Recirculation Pump - Install controls to turn the pump off when return temperature reaches 105°F, and on when the return temperature falls to 100°F. To qualify, the building must have 3 or more levels (excluding basement), one primary recirculation loop, no existing recirculation pump controls, and gas-heated water fueled by a participating utility. <input type="checkbox"/> \$420 per system						
Manufacturer	Model	Loop Length (ft)	Pump Size (hp)	Installed Cost	Qty	Incentive Requested
				\$		\$

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Terms and Conditions

- 1. Application.** Energy Trust's Existing Multifamily program (Program) must receive this application with all required accompanying documentation within 90 days of equipment purchase and installation in order to qualify for incentives. All required information must be submitted before this application will be processed. If Participant is applying for Oregon Housing and Community Services (OHCS) funding for equipment listed, Participant must contact the Program to discuss eligibility before submitting this application. The Energy Trust incentive funding available to NW Natural Industrial Sales Service Customer accounts established under Rate Schedule 3, 31 or 32 and Commercial Sales Service Customer accounts established under Rate Schedule 32 is subject to NW Natural's Schedule 360 filing with the Public Utility Commission of Oregon, and a signed **Form 112N: Natural Gas Non-Transportation Agreement** must be submitted in addition to this application to be eligible for Energy Trust natural gas incentives. Transportation service or Combination service customer accounts are not eligible for Energy Trust natural gas incentives. Participant represents that the information and documentation it submits in support of this application is complete, truthful and accurate. By submitting this application to Energy Trust, Participant further represents that none of the equipment requesting incentives will be submitted to the Oregon Department of Energy for conservation self-direct credits. Participant should retain a copy of this application and any accompanying documentation submitted. Energy Trust's Existing Multifamily Program Management Contractor (PMC) provides services for the Program on behalf of Energy Trust. Neither Energy Trust nor the PMC will be responsible for any lost documentation pertaining to this application, or any lost or misdirected mail.
- 2. Eligible Equipment.** Equipment must be new and must meet Energy Trust energy efficiency specifications to qualify. The specifications and incentive amounts listed in this application are subject to change. Check our posted **Multifamily Incentive Booklet** located at https://energytrust.org/wp-content/uploads/2016/10/be_mf_incentive_booklet.pdf to confirm current Program specifications and incentives. If you, or your contractor are not sure of the specifications, please call us before proceeding.
- 3. Equipment Installation.** Participant represents that (i) it has the right to install the energy saving equipment on the property and site(s) on which the equipment is installed and that any necessary consents have been obtained, and (ii) that all equipment installed and work performed complies with all federal, state, and local safety, building and environmental codes, and any manufacturer instructions.
- 4. Project Cost Documentation.** Participant must submit all sales slips, invoices, manufacturer specification sheets and other pertinent documents itemizing the equipment purchased. The project cost documentation submitted must show (i) the date of purchase and itemized price paid, (ii) size, type, make, and model or part number of equipment purchased, and (iii) a description of any installation or other labor charges. In addition to the required proof of purchase documentation, the Program may require additional site or technical information from Participant, for certain equipment, in order to determine whether it qualifies for incentives. Participant will provide Energy Trust with additional proof of purchase or other requested equipment information upon request. If Participant is leveraging external funding sources to directly reduce all or a portion of the final project costs incurred by Participant for the energy-efficiency equipment (for example, state/federal funding, grants, discounts, rebates, incentives or other similar types of consideration) then Participant is required to notify Energy Trust in writing when submitting the project documentation and Energy Trust's incentive will not exceed an amount equal to the total eligible project cost minus such external funds.
- 5. Payment.** Incentives will be paid following (i) installation of qualifying energy efficient equipment at the site address listed and in accordance with Program requirements, (ii) submission of this completed application, a completed **IRS Form W-9 (Request for Taxpayer Identification Number and Certification)** for the incentive check recipient and all required accompanying project cost documentation, and (iii) satisfactory completion of a post-installation verification, if required. Incentives will be paid directly to the named Participant unless the **Option to Assign Payment** section at the end of this form is completed. Please allow 60 days from Energy Trust's receipt of all information for delivery of incentive payment. Failure to deliver all required documentation may result in a delay or withholding of payment. Participant agrees and acknowledges that its acceptance of any Energy Trust incentive funding for energy-efficient equipment identified in this application constitutes representation and warranty to Energy Trust that such incentives were necessary for Participant to select and install the energy-efficiency equipment as described herein.
- 6. Incentives.** Funds for incentives are limited and subject to budget availability. Details of the Program, including incentives and other requirements, are subject to change. Final determination of eligibility for Energy Trust incentives rests solely with Energy Trust. The total incentive provided (i) will depend upon the incentive amounts in effect, as posted in the **Multifamily Incentive Booklet** located at https://energytrust.org/wp-content/uploads/2016/10/be_mf_incentive_booklet.pdf, as of the equipment installation date, and (ii) will never exceed the total project cost or a maximum of \$499,999. If any bonus amounts are available for qualifying equipment, the base incentive plus the bonus incentives will never exceed the total documented eligible project cost. Incentives paid to any Participant for all applications submitted to Program are limited to a maximum of \$500,000 per site per year.
- 7. Verification.** Equipment installations may be selected for a post-installation verification. Should Participant's property be chosen for a post-installation verification of the equipment, satisfactory completion of that verification has to occur before payment is issued. This verification is for the purpose of incentive payment only. No warranty is implied.

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- 8. Tax Liability.** Energy Trust is not responsible for any tax liability which may be imposed on the Participant as a result of any incentive payment. Energy Trust is not providing tax advice, and any communication by Energy Trust is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.
- 9. No Endorsement.** Energy Trust does not endorse any particular manufacturer, contractor or product in promoting the Program. The fact that the names of particular manufacturers, contractors, products or systems may appear in the Program does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.
- 10. Access and Evaluation.** Reviews and evaluations of project work during and after the energy-saving measure installation are a critical part of Energy Trust's evaluation process for energy savings and incentive calculations. Participant agrees to cooperate with any such evaluation as a requirement of its incentive agreement with Energy Trust. Participant agrees to provide Energy Trust and its representatives with (i) reasonable access to the project site(s), obtaining any and all necessary consents, (ii) requested technical and other project documentation related to the measure(s), and (iii) information about the energy use and operations of the measure(s) and/or project site(s) for the purposes of evaluating the energy savings during and after project completion. Participant agrees that Energy Trust and its representatives may inform subsequent owners of the project site(s) that Energy Trust has provided services to the project site(s) for the sole purpose of evaluating and facilitating Energy Trust program services.
- 11. Disclaimer/No Liability.** In connection with some applications, Energy Trust will provide incentive funding for energy-saving equipment. Participant understands that, while Energy Trust may provide this funding, neither Energy Trust nor the PMC are supervising any work performed for Participant, and neither Energy Trust nor the PMC are responsible in any way for proper completion of that work or proper performance of any equipment purchased. Participant assumes the risk of any loss or damage(s) that Participant may suffer in connection with the installation of the equipment. Energy Trust does not guarantee any particular energy savings results by its approval of this application, or by any other of its actions.
- 12. Energy Information Release.** By signing and submitting this incentive application to Energy Trust, Participant authorizes Energy Trust to access its energy usage data for all of Participant's electric and gas utility accounts at the physical address(es) of the project as listed. Participant agrees to provide other reasonable assistance to Energy Trust to obtain such information. Participant further authorizes Energy Trust to discuss its energy efficiency efforts with its utility account representative(s).
- 13. Information Release.** Participant agrees that Energy Trust may include some or all of the following information in reports to Bonneville Power Administration, the legislature, the Oregon Public Utility Commission (OPUC), and other government agencies as necessary to meet Energy Trust responsibilities and regulatory requirements: Participant's name, site address, general description of the type of energy saving or renewable project implemented (e.g. lighting, HVAC, solar PV), Energy Trust services or incentive payments provided to the Participant, and any energy saved or generated as a result of Energy Trust services or incentives. Energy Trust will treat all other information gathered as confidential and report it to such agencies only in the aggregate.
- 14. Governing Law.** This agreement shall be exclusively governed by and construed in accordance with the laws of the state of Oregon, without regard to any conflicts of laws rules thereof.

Participant Signature

By my signature below, I represent that (i) the Participant has read, understands and agrees to the terms and conditions of this agreement, (ii) I have the authority to sign this agreement on behalf of the Participant, and (iii) all accompanying project cost documentation is complete, true and accurate to the best of my knowledge.

Authorized Representative Name (printed)	Signature	Date
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FOR MORE INFORMATION: Call 1.877.510.2130, and ask for the Multifamily program. Documents transmitted with faxed, scanned or digital signature shall be deemed to be original signatures. At the request of Energy Trust, Participant shall confirm signature by providing an original document.

REMEMBER TO:

- Complete and sign this application
- Attach invoices, manufacturer specification sheet(s) and all other required project cost documentation for all equipment purchased
- Attach a completed IRS Form W9 for the incentive check recipient (either Participant or Payee). NOTE: The **Option to Assign Payment** section on the next page must be completed and signed as indicated if Participant is selecting to assign its incentive payment.

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Option to Assign Payment- PLEASE NOTE: The Energy Trust incentive payment will be made to Participant unless Participant and its designated Payee complete the section below to assign the payment to Payee. An *IRS Form W-9 (Request for Taxpayer Identification Number and Certification)* for the Payee named below must be attached if this option is selected.

PARTICIPANT and PAYEE

Both Participant and Payee understand and agree that if this Option to Assign Incentive Payment is selected the incentive check will be issued to the Payee named below at the address listed below and Energy Trust is not responsible for any tax liabilities that may be associated with the incentive payment. In addition, Participant understands that, notwithstanding this assignment, responsibility for complying with the terms and conditions of this incentive agreement shall continue to be the obligation of Participant, and Energy Trust's sole responsibility under this incentive agreement shall be to Participant. Accordingly, Payee understands that it shall have no rights against Energy Trust with respect to such assignment or the payment of the incentive, and in the event that Energy Trust does not pay the incentive as a result of Participant's failure to comply with this agreement, Payee's sole recourse shall be against Participant. Participant directs Energy Trust to pay any incentive to which it is entitled to the Payee named below and waives all rights to directly receive the Energy Trust incentives for the identified energy-efficiency project.

Payee Name (must match Payee's submitted IRS Form W-9)

Mailing Address	City	State	Zip
Phone	<input type="checkbox"/> cell <input type="checkbox"/> home <input type="checkbox"/> work		Fax
Participant Authorized Representative <i>(printed)</i>	Signature		Date
Payee Authorized Representative <i>(printed)</i>	Signature		Date