Customer Information

This home is ☐ Owner occupied ☐ A rental property I own*

*If the home is a rental property, and the owner or manager is receiving the incentive directly, a complete, accurate, and verifiable W-9 is required. Visit www.energytrust.org/w9.

Site address
City
State Zip

Mailing address (if different than site)
City
State Zip

Primary phone ☐ Home ☐ Work ☐ Cell ☐ Other Phone ☐ Home ☐ Work ☐ Cell

Utility Information

Electric utility: ☐ PGE ☐ Pacific Power ☐ Other
Gas utility: ☐ NW Natural ☐ Cascade Natural Gas ☐ Avista ☐ Other

Site Information

Year built: ☐ Electric furnace ☐ Ductless heat pump ☐ Wood
☐ Electric baseboard ☐ Gas furnace ☐ Propane
☐ Ducted heat pump ☐ Gas fireplace ☐ Other

Water heating fuel:
☐ Electricity ☐ Natural gas

Foundation/basement:
☐ Garage/basement combo ☐ Half basement ☐ Full basement
☐ Crawlspace w/ vapor barrier ☐ Crawlspace ☐ Slab on grade

Residence type:
☐ Single-family home ☐ Townhouse ☐ Duplex ☐ Fourplex
☐ Manufactured home ☐ Rowhouse ☐ Condo ☐ Triplex

Are you an Energy Trust trade ally submitting this as an Instant Incentive project? Yes, instant incentive amount listed on invoice: $ ___

Customer Name and Signature

By signing below, Customer agrees to the terms and conditions of this application and authorizes Contractor identified below to submit this application and all required invoices and documentation to Energy Trust on Customer's behalf. By that authorization, Customer represents to Energy Trust that all measures have been completed satisfactorily by Contractor as of the signature date below and all accompanying documentation is complete and accurate. If Customer identifies as a landlord or property owner applying for a single-family rental property incentive, Customer affirms that they own and do not reside in the property. If identified as an Energy Trust instant incentive project, Customer understands and agrees that Energy Trust will issue incentive check for incentives that meet Energy Trust requirements to the Contractor and Customer is responsible for paying the remaining balance of the invoice.

Customer signature
Full name (please print and use same name as on invoice)
Date

Customer email address (application status updates are sent via email) ___

Contractor Name and Signature

By signing below, Contractor certifies that this application and all accompanying documentation is complete and accurate, and all improvements associated with this incentive request were completed as of the signature date below. Incentives are payable to Customers only unless part of an instant incentive project. If identified as an instant incentive project, Contractor has shown instant incentive amount listed above as itemized discounts from Customer's invoice and agrees to the terms and conditions set forth in Form 372IN: Participation Agreement – Instant Incentives. To receive incentives, all work must comply with the Home Retrofit Specifications Manual.

Contractor signature
Full name (please print)
Date

Contractor company OCCB# or Washington License # (Non-trade ally only) Install date
☐ Project meets Home Performance with ENERGY STAR requirements. BPI technician (print name): ___
Gas Tankless Water Heater Incentive *Hybrid water heaters do not qualify. Residence must be located in Washington and primarily heat water with natural gas provided by NW Natural.*

<table>
<thead>
<tr>
<th>Upgrade type</th>
<th>Requirements</th>
<th>Incentive Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gas tankless water heater</td>
<td>Uniform Energy Factor (UEF) must be 0.81 or greater. A CO monitor is required on every floor with a bedroom.</td>
<td>$200</td>
</tr>
</tbody>
</table>

![Image](Image)  

**Water heater**  
Manufacturer: Model: UEF:  
Serial number: Installed cost:  

Heat Pump Water Heater Rental Property Incentive  
*Residence must be located in Oregon and primarily heat water with electricity provided by PGE or Pacific Power.*

Heat pump water heater incentives are available at an increased incentive amount for Oregon residents that qualify for Savings Within Reach. Contact your Energy Trust account manager for more information on how to offer increased incentives.

<table>
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<th>Requirements</th>
<th>Incentive Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heat pump water heater installed a single-family rental property</td>
<td>Eligible models must meet Northwest Energy Efficiency Alliance’s (NEEA’s) Advanced Water Heater Specification Tier 3 and replace an existing electric water heater. Residence must be single-family or manufactured home. Tank may be any size. <strong>Must be offered by an approved Energy Trust trade ally as an instant incentive to qualify.</strong></td>
<td>$270</td>
</tr>
</tbody>
</table>

**Water heater**  
Manufacturer: Model: UEF:  
Serial number: Installed cost:  
Location installed:  
- Garage  
- Crawlspace  
- Basement  
- Main home  
- Other:

1 Multifamily residences are not eligible for increased rental property incentives. For information about other Oregon multifamily property incentives, including stacked units, visit [http://www.energytrust.org/multifamily](http://www.energytrust.org/multifamily).
Terms and Conditions

APPLICATION: This application and any required additional documentation must be filled out completely, truthfully and accurately. Customers may wish to retain a copy of this application and any accompanying documentation submitted to Energy Trust under this program. Energy Trust will not be responsible for lost documentation pertaining to this application request. Energy Trust must receive applications within 60 days after the date of installation. Incentives offered are subject to funding availability and may change. Incentive amounts are valid for installations done through December 31, 2020. Please allow 4-6 weeks for incentive processing.

ELIGIBILITY: Incentives are available to eligible Customers who are: (i) Oregon residential electric service customers of Portland General Electric or Pacific Power, (ii) Oregon residential natural gas service customers of NW Natural, Cascade Natural Gas or Avista, or (iii) Washington residential natural gas service customers of NW Natural. Incentives are subject to eligibility of the measure, timely completion and/or installation of the measures, and (iii) timely submission of all required documentation of measures. Incentives will be paid after: (i) completion and/or installation of the energy-saving measures, (ii) verification of the eligibility of the measure, and (iii) timely submission of all required documentation of measures. Incentives will be paid directly to Customer unless submitted as an instant incentive project. Instant incentive projects will be paid to the contractor. All amounts must be paid to the contractor signing this application or any other Oregon or Washington licensed contractor.

PROOF OF PURCHASE: The invoice documentation accompanying this application must itemize the products purchased and/or work performed. The invoice must show a description of any installation or other labor charges and that the invoice is paid in full.

INCENTIVE AMOUNT: Incentive amount cannot exceed total installed cost. Incentives for energy-saving measures completed and/or installed as set forth in documentation accompanying this application are limited to the amounts provided by Energy Trust. Such amounts are subject to change. Current incentive amounts are identified on the web at http://www.energytrust.org. Contact Energy Trust with any questions.

TAX LIABILITY: Energy Trust is not responsible for any tax liability, which may be imposed on the Customer as a result of payment of any incentives or as a result of obtaining financing. 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.

FACSIMILE/SCANNED: Facsimile transmission of any signed original document, and the retransmission of any signed facsimile transmission, are the same as delivery of the original signed document. Scanned original documents transmitted to Energy Trust as an attachment via electronic mail are the same as delivery of the original signed document. At the request of Energy Trust, Customer shall confirm documents with a facsimile transmitted signature or a scanned signature by providing the original document.

SAFETY AND BUILDING CODES: Customer represents that, with respect to the products and work performed identified in the documentation accompanying this application: (i) all products installed and work performed complies with all federal, state and local safety, building and environmental codes, and (ii) products are UL listed, if applicable, and installed per manufacturer’s instructions.

NO ENDORSEMENT: Energy Trust does not endorse any particular manufacturer, contractor, or product. The fact that the names of particular manufacturers, contractors, products, or systems may appear on this application does not constitute an endorsement.

PROPERTY RIGHTS: Customer represents that Customer has the right to complete and/or install the energy-saving measures on the property on which those measures are completed and/or installed and that any necessary landlord's consent has been obtained.

ACCESS AND EVALUATION: Energy Trust and/or its representatives may request access to the property on which energy-saving measures have been completed and/or installed and may review and evaluate the project during and after completion. Customer agrees to provide reasonable access to the property for the purposes described herein.

DISCLAIMER/NO LIABILITY: Customer understands that, although Energy Trust may provide Customer with an incentive payment, Energy Trust is not supervising work performed for Customer nor is Energy Trust responsible in any way for proper completion of that work or proper performance of any products purchased. Energy Trust is simply providing funding to assist Customer in implementing energy-saving measures. Customer assumes the risk of any loss or damage(s) that Customer may suffer in connection with installation of the measures. Energy Trust does not guarantee any particular energy-saving results by its approval of the application or by any other of its actions.

ENERGY INFORMATION RELEASE: Customer authorizes Energy Trust and the contractor signing this application to access utility energy usage data relating to the property on which energy-saving measures have been completed and/or installed. To do so, Energy Trust may access the electric and natural gas accounts and thermostat usage information at the physical address of the project, and the contractor may access thermostat usage information at the physical address of the project. Customer agrees to provide reasonable assistance to Energy Trust to obtain such information. Customer also authorizes the contractor signing this application to share information about the Customer’s thermostat system, including, without limitation, thermostat usage information, with Energy Trust.

INFORMATION RELEASE: Customer agrees that Energy Trust may include Customer’s name, Energy Trust services and resulting energy-savings in reports or other documentation submitted to Energy Trust, its Board of Directors, the Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing and Community Services and/or the Oregon Legislature. Energy Trust will treat all other information gathered in evaluations as confidential and report it only in the aggregate.