

Equipment Incentive Application

EPS New Construction | Incentive Application | Form 605A



Steps to completion:

- 1 Purchase** eligible equipment between January 1, 2021 and December 31, 2021.
- 2 Complete** and sign application, including:
 - Trade Ally signature
 - Attach an itemized receipt
- 3 Submit** completed form and W-9 to

Energy Trust of Oregon
EPS New Construction
4105 SE International Way
Suite 505
Milwaukie, OR 97222

1.855.575.4315 fax
eps@energytrust.org

Need-to-know information:

- Please allow up to 60 days for your receipt of payment. A W-9 is required, and the payment will be made to the name on the W-9.
- Energy Trust must receive applications within 90 days of equipment purchase date.
- The maximum incentive amount for each piece of equipment is 50 percent of the purchase price.
- EPS New Construction trade allies can apply for up to \$1,200 in equipment incentives per year.

Trade Ally Information

Energy Trust Use Only

PT ID

Company Name

Company Contact Name

Phone Home Work Cell

Technician or Verifier Name

Email Address

Site Information

(must be a home eligible for and applying for incentives through the Energy Trust EPS New Construction Program)

Name of program technician overseeing quality control

Home Site Address

City

State

Zip

Builder Name

Equipment Information

Eligible Equipment Purchased	Number Purchased	Equipment Cost	Expected Incentive (50 percent of cost)
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
Total Expected Incentive (Not to exceed \$1,200)			\$

Itemized invoice receipt attached? Yes No

Acceptance of Terms and Conditions

By signing this application, I verify that I am authorized to submit this application on behalf of the Energy Trust trade ally company listed below and that the information presented herein is true and correct. I understand and agree to the terms and conditions as set forth herein.

**SIGN
HERE**

Trade Ally Signature

Date

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Terms and Conditions

APPLICATION: This *Form 605A* must be filled out completely, truthfully and accurately. Trade allies may wish to retain a copy of this application and any accompanying documentation submitted to Energy Trust. Energy Trust will not be responsible for lost documentation pertaining to this application. Incentives are available for eligible equipment purchased between January 1, 2021 and December 31, 2021. Funds for the Incentives are limited and available on a first-come first-served basis. Application must be submitted within 90 days from the date of purchase in order to be eligible for incentives.

ELIGIBILITY: Incentives for eligible equipment are available to trade allies conducting performance testing services on homes applying for incentives through the EPS New Construction Program in Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas or Avista service territories. Eligible equipment includes blower doors and duct blasters, as well as additional items with written pre-approval from Energy Trust on a case-by-case basis. Energy Trust will not approve reimbursement for ancillary non-verification specific tools and equipment that may be used in the course of home verifications, such as ladders, protective gear, or computers.

VERIFICATION: Energy Trust will, in Energy Trust's sole discretion, verify that Applicant completed performance testing upon final certification of the home tested.

PAYMENT: Energy Trust will pay incentives upon (i) purchase of eligible equipment(s), (ii) submission and approval of the completed Equipment Incentive Application, (iii) provision to Energy Trust of an itemized invoice receipt, and (v) provision to Energy Trust of a complete, accurate and verifiable W-9. Payments will be made to the trade ally and trade ally's information must match information on the W-9. Incentives are limited to the reimbursement of purchase of equipment as set forth in this application. Incentives paid to the trade ally will not exceed the lesser of (i) actual cost of the products purchased, or (ii) the maximums set forth in this application. Please allow up to 60 days for receipt of payment.

INCENTIVE AMOUNT: Annual incentive funds paid will not exceed \$1,200 per technician or verifier or 50 percent of the actual cost of the eligible equipment.

INFORMATION RELEASE: Trade ally understands and agrees that Energy Trust and/or its representatives may include a description of this application, including the trade ally's name, services provided, project cost or energy savings, in reports, studies, and other documentation requested by Energy Trust, its Board of Directors, the Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing & Community Services, and the Oregon Legislature. Energy Trust will treat all other information gathered as confidential and report it only in the aggregate.

TAX LIABILITY: Energy Trust is not responsible for any tax liability that might be imposed on the trade ally as a result of payment of incentives. 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.

NO ENDORSEMENT: Energy Trust does not endorse any particular manufacturer, contractor, equipment or system. The fact that the names of particular manufacturers, contractors, equipment or systems may appear on this application does not constitute an endorsement. Manufacturers, contractors, equipment, or systems not mentioned are not implied to be unsuitable or defective in any way.

PROPERTY RIGHTS: Trade ally represents that trade ally has the right to perform the energy savings testing on the property on which such testing is performed and that any necessary property owner consent has been obtained.

ACCESS AND EVALUATION: Energy Trust and/or its representatives may request access to the property and may review and evaluate the project during and after completion. Trade ally hereby agrees to assist Energy Trust by communicating with the property owner regarding reasonable access to the property for the purposes described herein.

DISCLAIMER/NO LIABILITY: Trade ally understands that, while Energy Trust is providing trade ally with incentives payment, Energy Trust is not supervising the testing work performed by trade ally, nor is Energy Trust responsible in any way for proper completion of that testing work. Energy Trust is simply providing funding to assist trade ally in performance testing energy savings measures. Energy Trust does not guarantee any particular energy savings results by its approval of this application or by any other of its actions.

SURVIVAL OF TERMS AND CONDITIONS: Unless stated otherwise in this document, regardless of whether or not this application is approved, these terms and conditions shall survive the payments of any incentive payments provided hereunder.

Resources

Link to W-9
www.energytrust.org/w9

The Energy Conservatory
www.energyconservatory.com/products

Additional EPS New Construction Resources
www.energytrust.org/trade-ally/programs/new-homes/resources/

Contact Us

Energy Trust of Oregon EPS New Construction
Email: eps@energytrust.org
Phone: 1.877.283.0698