# **Trade Ally Training and Mileage Incentive Application**

EPS New Construction | Incentive Application | Form  $625_{TA}$ 



## Steps to completion:

- **1** Attend an educational training between January 1, 2024 and December 31, 2024.
- 2 Complete and sign application, including:
  - Attached proof of purchase
    - Completed W-9
  - Your signature
- 3 Submit completed form and W-9 to: **Energy Trust of Oregon EPS New Construction Program** 111 SW Columbia St, Suite 945 Portland, OR 97204

1.855.575.4315 fax eps@energytrust.org

#### Need-to-know information:

- Please allow up to 60 days for your receipt of payment. If a W-9 is required, the payment will be made to the name on the W-9.
- Energy Trust must receive applications within 90 days from the date of completed training or trip.
- Energy Trust will pay training costs up to a maximum of \$250 per individual and up to \$1,200 per organization per calendar vear.
- To be eligible for reimbursement, trainings must cover content related to energy efficiency in new homes.
- Incentive will not exceed the cost paid for the training and will take into consideration discounts and special offers with other organizations providing training funds.
- To ensure training will be approved for incentives, contact the Program for confirmation prior to taking the training.
- Verifiers can contact their Account Manager to request pre-approval for mileage reimbursement, prior to submitting this form

Trade	Allv	Information	
I I UUU		momation	

Energy Trust Use Only

Company Name

**Company Contact Name** 

Email Address

Mailing Address

Fax

State Zip

Phone

City

Receipt or proof of purchase is included

Training Information						
Training	Date	Location	Attendee Name	Cost of Training		
				\$		
				\$		
				\$		
				\$		
				\$		
				\$		
Total Training I (not to exceed: \$	\$					

### Miloago Roimhursomont

Date	From Address	To Address	Total Mileage	Reason for Trip				

Mileage reimbursement is for outlying rural territories in approved Energy Trust regions only, with a maximum annual cap of \$2,000, paid at the current federal mileage rate.

### Acceptance of Terms and Conditions

By signing this application, I verify that I am authorized to submit this application on behalf of the applicant listed above and that the information presented herein is true and correct. I understand and agree to the requirements and terms and conditions as set forth herein.



**Trade Ally Authorized Representative Signature** 

Date

## **Trade Ally Training and Mileage Incentive Application**

EPS New Construction | Incentive Application | Form 625TA



#### 

## **Terms and Conditions**

**APPLICATION:** Incentives are available for eligible educational training(s) attended between January 1, 2024 and December 31, 2024. Funds for the Incentives are limited and available on a first-come, first-served basis. Application must be received by Energy Trust's EPS New Construction Program within 90 days of the training to be eligible for incentives.

**ELIGIBILITY:** Incentives for educational training(s) are available to trade allies that participate in Energy Trust's EPS New Construction program in the Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, or Avista service territories. Trade allies must have participated in an EPS New Construction project in past two (2) calendar years and/or plan to participate in EPS New Construction program in the coming year. To be eligible for reimbursement, trainings must include content related to energy efficiency in new homes.

**VERIFICATION:** Energy Trust or its agent will, in Energy Trust's sole discretion, verify that (i) the Applicant successfully completed eligible training(s) and passed the competency test(s), if applicable, and (ii) the trainings are eligible for an incentive under this application.

**PAYMENT:** Any eligible Incentives will be promptly paid after (i) submission and approval of the completed Trade Ally Training Incentive Application, (ii) itemized receipt for training and (iii) a complete W-9. Payments will be made to the Applicant and must match name on the submitted W-9, if a W-9 is required. Please allow up to 60 days for receipt of payment after Energy Trust reviews and approves the application.

**INCENTIVE AMOUNT:** Incentive funds paid will not exceed the actual cost of training completed by the trade ally. The training incentive is limited to the cost of training per individual, with a maximum incentive not to exceed \$250, whichever is less. No more than \$1,200 in incentives will be provided to one organization per calendar year.

**INFORMATION RELEASE:** The Applicant understands and agrees that Energy Trust and/or its representatives may include a description of this incentive, including the Applicant's name, the Applicant's company name, services provided, project cost and energy savings, in reports, studies, and other documentation required by Energy Trust, its Board of Directors, the Oregon Legislature, the Oregon Public Utility Commission, Oregon Department of Energy, the Oregon Legislature, funding utilities, and/or other government agencies. Energy Trust will treat all other information gathered in as confidential and report it only in the aggregate.

**TAX LIABILITY:** Energy Trust is not responsible for any tax liability imposed on the Applicant as a result of payment of the 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.

**DISCLAIMER/NO LIABILITY**: Applicant understands that, while Energy Trust is providing Applicant with funding for the incentives payment, Energy Trust is not supervising Applicant or Applicant's training nor is Energy Trust responsible in any way for proper training or performance by Applicant. Energy Trust is simply providing funding to assist Applicant in education and training. Energy Trust does not guarantee any particular energy-savings results by its approval of the 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 energytrust.org/w9

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

Contact Us Energy Trust of Oregon EPS New Construction Email: <u>eps@energytrust.org</u> Phone: 1.877.283.0698