

Residential Project Detail Form

Revised 3/17/2016

APPLY

You can get pre-approved for a loan online at www.SmartEnergyPays.com/homeowners, by visiting a local Summit Credit Union branch, or calling **(800) 236-5560** (press 2 for loan information).

SUBMIT

Bring this form, your contractor bid, and income verification to your local Summit Credit Union branch to close the loan.

QUESTIONS?

Contact Rose Buss at (414) 286-3351 or rkbuss@milwaukee.gov.

HOMEOWNERS: Please fill out the following sections:

- Section 1: Homeowner Information
- Section 2: Property Information & Eligibility
- Section 3: Focus on Energy Incentives
- Section 5: Terms
- Section 6: Payment Authorizations
- Section 7: Homeowner Signature

SECTION 1: HOMEOWNER INFORMATION

Homeowner Name _____

Contact Name (person to whom all communication will be directed) _____

Email _____ Phone _____ Alternate Phone _____

Mailing Address _____

Preferred Method of Contact: Email Phone Mail

How did you hear about the Me² program?

- City of Milwaukee website
- Contractor or their website
- Summit Credit Union or their website
- Event _____
- Previous program participant _____
- Someone else you know _____
- Other _____

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SECTION 2: PROPERTY INFORMATION & ELIGIBILITY

Property Address (site of improvement, if different from above) _____

City Milwaukee State WI Zip _____

ELIGIBILITY

You are eligible for Me² financing if your home meets the following criteria. Please confirm your eligibility by checking all of the following boxes.

- Property to be upgraded is located within the City of Milwaukee
- Single-family home, duplex, or triplex (3 units or less)
- Owner of building must be listed as an individual or living trust and not as a LLC or form of business
- No delinquent property taxes are due to the City of Milwaukee on the property
- I will use a Participating Me² Contractor to complete the project

SECTION 3: FOCUS ON ENERGY INCENTIVES

You may be eligible for larger Tier 2 incentives if your household income level falls below the upper limits outlined below:

HOUSEHOLD SIZE	ANNUAL INCOME UPPER LIMIT
1	\$34,134
2	\$44,637
3	\$55,140
4	\$65,642
5	\$76,145
6	\$86,648

If you qualify, download the [Tier 2 Income Eligibility Application and Guidelines](#) from the Focus on Energy website and submit it directly to Focus on Energy along with the required income documentation.

Please choose the level of incentives you have been approved for: Tier 1 Tier 2

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SECTION 4: PROJECT DESCRIPTION & COST (TO BE COMPLETED BY THE CONTRACTOR)

CATEGORY	DESCRIPTION		PROJECT COST	TIER 1	TIER 2	NET COST (PROJECT COST - INCENTIVE)
Whole Home	10-19% energy reduction	Please check the measures used: <input type="checkbox"/> Air Sealing <input type="checkbox"/> Attic Insulation <input type="checkbox"/> Exterior Wall Cavity Insulation <input type="checkbox"/> Interior Foundation Insulation <input type="checkbox"/> Sill Box Insulation <input type="checkbox"/> Attic Ventilation <input type="checkbox"/> Polyethylene Vapor Barrier <input type="checkbox"/> Vent Existing Exhaust Fans Out of Attic		\$850	\$1000	
Whole Home	20-29% energy reduction			\$1250	\$1500	
Whole Home	30%+ energy reduction			\$2000	\$2250	
Furnace	Propane multi-stage with ECM, 90% AFUE			\$100	\$300	
Furnace	Natural gas, 95%+ AFUE			N/A	\$350	
Furnace	Natural gas with ECM, 95%+ AFUE			\$125	\$525	
Central AC	ENERGY STAR, SEER 14+ (SEER:)			\$0	\$0	
Combo	Natural gas with ECM, 95% AFUE & 16+ SEER air conditioner			\$250	\$750	
Boiler	Modulating natural gas with outdoor reset control, 90% AFUE			\$0	\$0	
Boiler	Modulating natural gas with outdoor reset control, 95% AFUE			\$400	\$550	
Boiler	Modulating combination natural gas with integrated domestic hot water and outdoor reset control, 95% AFUE			\$500	\$675	
Water Heater	Indirect water heater (installed with qualified boiler)			\$100	\$150	
Water Heater	Natural gas storage, EF 0.67+			\$0	\$0	
Water Heater	Natural gas condensing storage, TE 90%+			\$0	\$0	
Water Heater	Natural gas tankless, EF 0.82+			\$0	\$0	
ECM	ECM replacement			\$100	\$100	
Heat Pump	Air source, 16+ SEER & 8.4+ HSPF (propane, oil or electric furnace only; cannot be a mini-split or ductless system)			\$300	\$300	
Heat Pump	Geothermal heat pump system, EER 15+			\$650	\$650	
Thermostat	Smart thermostat installed with qualified furnace, boiler or air source heat pump			\$75	\$75	
Windows	ENERGY STAR windows (# of windows:)			\$0	\$0	
BONUS	Complete both Whole Home & Heating/Cooling Improvement			\$250	N/A	
SUBTOTAL						

SUPPORT MEASURES (Electrical upgrades, leaking roof, asbestos removal, oil tank removal, etc. necessary to complete above improvements. This category may not exceed 25% of the above subtotal)

MEASURE	DESCRIPTION	PROJECT COST
1		
2		
3		

A. TOTAL PROJECT COST: _____

B. FOCUS ON ENERGY INCENTIVE: _____

C. OUT OF POCKET COST (Pd by Customer): _____

D. REQUESTED SUMMIT PAYMENT: _____

(\$15,000 max; subtract lines B & C from line A above)

SECTION 5: TERMS

By checking the box below, you are certifying the property's eligibility to receive Me² Financing and have read and understand the main terms of the program.

I have read and understand the following terms of the Me² program.

The City of Milwaukee, the Me² program, and Summit Credit Union:

- Recommend you contact your contractor for detailed manufacturer equipment warranties.
- Read and adhere to Homeowner Consumer Tips:
<http://datcp.wi.gov/uploads/Consumer/pdf/HI-ConsumerTips136Web.pdf>
- Do not endorse any particular installation contractor, engineering firm, manufacturer, product, or system design by this offering.
- Are not responsible for any tax liability imposed on the recipient as a result of incentives.
- Make no representation or warranty and assume no liability with respect to the quality, safety, performance, or other aspect of any design, consulting, product, system, equipment, or appliance installed or received and expressly disclaim any such representations, warranties, and liability, including, but not limited to, any implied warranties of merchantability or fitness for a particular purpose. Please contact your contractor for detailed manufacturer equipment warranties.
- Do not guarantee that installation and operation of energy efficient equipment will result in reduced usage or in cost savings.
- Are not liable for any damages, including any incidental or consequential damages, arising out of the operation or malfunction of the products, equipment, or appliances, or the installation thereof.
- Signatory(ies) indemnify the Me² program, the City of Milwaukee, their respective affiliates, subsidiaries, parent companies, officers, directors, agents, and employees against all losses, damages, expenses, fees, costs, and liability arising from any design, consulting, product, system, equipment, or appliance.
- Unless notified in writing, the Me² program reserves the right to publicize participation in the program.
- A Me² program representative may schedule a site visit to verify that qualified products, systems, equipment, or appliances were installed.

SECTION 6: PAYMENT AUTHORIZATIONS

At the homeowners discretion, Summit may either pay the contractor 100% of the loan upon completion of all agreed upon work OR pay a 30% construction advance and the remaining 70% upon project completion. Homeowner should select one of the following options:

- Pay Contractor only upon completion of the work. Summit Credit Union will issue the Contractor a check 1-2 weeks after the Contractor submits the Completion Certificate, including documentation of City permits.
- Pay Contractor 30% down as a construction advance and the remainder upon completion. 1-2 weeks after initial loan closing, Summit Credit Union will issue the Contractor a check for 30% of the loan amount. Upon completion of all work, Summit will issue the Contractor a check for the remaining balance 1-2 weeks after the Contractor submits the Completion Certificate.



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SECTION 7: HOMEOWNER SIGNATURE

To the best of my knowledge, the statements above are complete, true, and correct. I hereby certify that I hold title to the property and am authorized to submit this application. By signing this application, I authorize Summit Credit Union and the Focus on Energy program to release project information such as energy savings estimates to the Me² program and its affiliates, including the Wisconsin Energy Conservation Corporation, City of Milwaukee, and US Department of Energy. Submission of this Application Form does not guarantee approval.

Signature _____

Printed Name _____ Date _____

SECTION 8: CONTRACTOR INFORMATION & SIGNATURE

Contractor Name _____

Authorized Contractor Representative _____

Email _____ Phone _____

Mailing Address _____

Please confirm all of the following statements by checking the following boxes:

- I am a Me² Participating Contractor currently in good standing with the program.
- I am a Focus on Energy Trade Ally currently in good standing with the program.
- I have provided this homeowner with a written bid that matches the project description contained in Section 4.
- To the best of my knowledge, the proposed improvements are eligible for Focus on Energy incentives as noted in Section 4 (except support measures) and I will submit the incentive request to Focus on Energy within 10 business days of project completion. I will utilize the Instant Discount option so that the customer only pays the net project cost after incentives.
- I acknowledge I will be paid according to the homeowner selection in Section 6 and that it is my duty to submit the Completion Certificate to Summit Credit Union.
- I will pull the required City of Milwaukee permits for the proposed improvements and will cure any deficiencies that do not pass permit inspection at no additional cost to the homeowner.
- I will cure any installation deficiencies identified by the Me² program staff or Focus on Energy program staff at no additional cost to the homeowner.
- My bid includes proper disposal/recycling of any waste generated as a result of this project.

To the best of my knowledge, the statements above are complete, true, and correct. I hereby certify that I am authorized to submit this Application Form and affix my signature below. Submission of this Application Form does not guarantee approval.

Signature _____ Title _____

Printed Name _____ Date _____