Residential Project Detail Form

Form 1: Standard Focus Rewards. Rev 1/03/2014)

SUBMIT: Please provide this form to your Summit Credit Union loan officer, or upload it along with your online application at **www.j.mp/Me2Financing**

CONTACT: For questions about the program your current status, please contact Erick Shambarger at 414-286-8556 or eshamb@milwaukee.gov. For details on the program visit: www.smartenergypays.com/homeowners

---

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

SECTION 2: PROPERTY INFORMATION & ELIGIBILITY (Site of Improvement, if different from above)

Property Address:
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 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
- ☐ I have not been approved for Enhanced Rewards from Focus on Energy (If you have been approved for income-based Enhanced Rewards or the Assisted Home Performance Program, please use Form 2 Instead)

Me2
Milwaukee Energy Efficiency
SmartEnergyPays.com

Residential Project Detail Form

Form 1: Standard Focus Rewards.

SECTION 3: PROJECT DESCRIPTION AND COST (To be completed by the Contractor)

Type	Description	Focus Program	Project Cost	Focus Incentive	Net Cost (Project less Incentive)
Building Shell	Air Sealing	HPwES			
Building Shell	Attic Insulation	HPwES			
Building Shell	Exterior Wall Cavity Insulation	HPwES			
Building Shell	Interior Foundation Insulation	HPwES			
Building Shell	Sill Box Insulation	HPwES			
Building Shell	Attic Ventilation	HPwES			
Building Shell	Polyethylene Vapor Barrier	HPwES			
Building Shell	Vent Existing Exhaust Fans Out of the Attic	HPwES			
	Sub-total 1 HPwES Project Cost and Incentives (1/3 of cost of all program eligible measures, capped at $1,250+bonus rebates)				
Furnace	Natural Gas/LP/Oil, Multi-Stage with ECM, 90%+ AFUE	Res Rewards		$0	
Furnace	Natural Gas, Multi-Stage with ECM, 95%+ AFUE	Res Rewards		$225	
Combo	95% Furnace, Multi-Stage with ECM & 16 SEER AC Combo	Res Rewards		$325	
Boiler	Modulating with Outdoor Reset, 90%+ AFUE	Res Rewards		$300	
Boiler	Modulating with Outdoor Reset, 95%+ AFUE	Res Rewards		$400	
Water Heater	Indirect water heater installed with qualified boiler	Res Rewards		$0	
ECM	Replacement Electronically Commutated Motor	Res Rewards		$125	
Water Heater	Natural Gas Storage Water Heater EF >0.67	Res Rewards		$0	
Water Heater	Natural Gas, Condensing Storage, TE 90%+	Res Rewards		$0	
Water Heater	Natural Gas, Tankless Water Heater, EF 0.82+	Res Rewards		$0	
Water Heater	Heat Pump Water Heater	Res Rewards		$0	
Heat Pump	Geothermal Heat Pump, EER rating >15	Renewables		$650	
	Subtotal 2 of all above measures (including Subtotal 1 HPwES)				
Support measures	Electrical upgrades, fix leaking roof, asbestos removal, oil tank removal, etc. necessary to complete above improvements. This category may not exceed 25% of the above subtotal				
1				--	
2				--	
3				--	
4				--	
	Subtotal 3 of all support measures			--	

A. **TOTAL PROJECT COST:**

B. **FOCUS ON ENERGY INCENTIVE:**

C. **OUT OF POCKET COST:**

D. **REQUESTED LOAN AMOUNT ($15,000 max loan; A-B-c above):**

SECTION 4: TERMS

By checking the box below, you are certifying the property's eligibility to receive Me^2 PACE Financing and have read and understand the main terms of the program (see page 3 of this Interest Form).

☐ I have read and understand the following terms of the Me^2 program.

The City of Milwaukee, the Me^2 program, the Wisconsin Energy and Conservation Corporation 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-ConsumerTipsWeb136.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 Me^2 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 Me^2 program reserves the right to publicize participation in the program.
- A Me^2 program representative may schedule a site visit to verify that qualified products, systems, equipment, or appliances were installed.

SECTION 5: 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. Home owner should select one of the following options:

☐ Pay Contractor only upon completion of the work. Summit Credit Union will issue the Contractor a check in 1-2 weeks after the Contractor submits the Completion Certificate, including documentation of City permits.

☐ Pay Contractor 30% down as a construction advance and remainder upon completion. After initial loan closing, Summit Credit Union will issue the Contractor a check for 30% of the loan amount in 1-2 weeks. Then upon completion of all work and obtaining all the required Completion Certificate, Summit will send out a check to the contractor for the remaining balance in 1-2 weeks.

Me2 Milwaukee Energy Efficiency
SmartEnergyPays.com

Residential Project Detail Form

Form 1: Standard Focus Rewards.

SECTION 6: 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. Submission of this Application Form does not guarantee approval.

Signature_____

Printed name_____Date_____

SECTION 7: CONTRACTOR INFORMATION & SIGNATURE

Contractor Name:
Authorized Contractor Representative:
Email: Phone: Alternate Phone:

Mailing Address:

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

- ☐ I am a Me^2 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 3
- ☐ To the best of my knowledge the proposed improvements are eligible for Focus on Energy incentives as noted in Section 3 (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 customer only pays the net project cost after incentives.
- ☐ I acknowledge I will be paid according to the homeowner selection in Section 5 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 Interest Form and affix my signature below. Submission of this Application Form does not guarantee approval.

Signature_____Title_____

Printed name_____Date_____