

Residential Project Detail Form

Me² offers up to \$3,000 per household in bonus incentives to all City of Milwaukee homeowners.

APPLY

Customers interested in Me² loans can get pre-approved for a loan online at: www.summitcreditunion.com/borrow/energy-efficiency-loans, by visiting a local Summit Credit Union branch, or calling (800) 236-5560 (press 2 for loan information). For Me² loan customers, bring this form, your contractor bid, and income verification to your local Summit Credit Union branch to close the loan.

SUBMIT

Me² bonus incentives are available to all City of Milwaukee residents. To receive Me² bonus incentives, send a copy of this form and your Me² Completion Certificate to: [ME2@Slipstreaminc.org](mailto:ME2@slipstreaminc.org) or mail to: Me² Program, 431 Charmany Drive Madison, WI 53719

This application is for qualified items installed between July 1, 2021 and April 30, 2022. Complete applications must be received within 60 days of installation. Me² bonus funding is limited and will be paid out on a first come, first served basis. Me² bonus incentives plus Focus on Energy incentive cannot exceed the cost of the improvement. Me² bonus incentives are only paid once per household.

CONTACT INFORMATION:

Phone: 608-729-6808

Email: ME2@slipstreaminc.org

HOMEOWNERS - Please fill out the following sections:

Section 1: Homeowner Information

Section 5: Terms

Section 2: Property Information & Eligibility

Section 6: Payment Authorizations

Section 3: Focus on Energy Incentives

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

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 the following boxes.

- Property to be upgraded is located within the city of Milwaukee.
- Single-family home, duplex, or triplex (3 units or less).
- Building owner must have an individual or living trust, not an LLC or other form of business (for Me² loans only).
- No delinquent property taxes are due to the city of Milwaukee on the property (for Me² loans only)
- I will use a participating Me² contractor to complete the project.

SECTION 3: FOCUS ON ENERGY TIER 2 INCOME QUALIFIED INCENTIVES

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

Household Size	Annual Income Upper Limit
1	\$41,471
2	\$54,231
3	\$66,991
4	\$79,751
5	\$92,511
6	\$105,271
7	\$107,664
8	\$110,056

If you qualify, visit the Focus on Energy website at focusonenergy.com/Tier2 to submit an online application or download the application to apply with the required income documentation.

City of Milwaukee homeowners qualifying for Focus on Energy, Tier 1 and/or Tier 2 also qualify for Me² incentives.

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

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SECTION 4: PROJECT INCENTIVES, DESCRIPTION & COST (to be completed by the contractor)

Please circle the Me2 incentive you're applying for.

Category	Description	Project Cost	Focus on Energy Incentives		ME ² Bonus Incentive	Net Cost (Project cost minus INCENTIVE)
			Tier 1	Tier 2		
Air Sealing	ENERGY STAR® Qualified Air Sealing (Energy assessment required)		\$450	\$750	\$500	
Insulation	Attic Insulation		\$350	\$450	\$500	
Insulation	Foundation Insulation		\$100	\$150		
Insulation	Wall Insulation		\$300	\$300	\$250	
Insulation	Duct Sealing & Insulation		\$50	\$50		
Furnace	95% AFUE Single- or Multi-Stage Natural		\$50	\$350	\$450	
Furnace	96% AFUE Single- or Multi-Stage Natural		\$100	\$450	\$500	
Furnace	97%+ AFUE Multi-Stage Natural Gas		\$150	\$550	\$550	
Boiler	95%+ AFUE Natural Gas Home Heating		\$400	\$550	\$450	
Boiler	95%+ AFUE Natural Gas Combination		\$500	\$675	\$500	
Air Source Heat Pump	15+ SEER, 8.5+ HSPF (propane, oil, natural gas or electric furnace only, cannot be a mini-split or ductless system) *See Focus on Energy		*Varies	*Varies	\$1000	
Me ² Package Incentive	To be eligible, package these 3 items: 1. Air Sealing 2. Attic or Wall Insulation 3. New Heating Source **Must have a home energy audit to be eligible for package incentive.				\$1,000	
Air Conditioner	15+ SEER		\$0	\$0		
ECM	ECM Replacement (must replace existing PSC Motor)		\$25	\$25		
Water Heater	Indirect Water Heater installed at the same time as a qualifying boiler		\$100	\$150		
Thermostat	Smart Thermostat installed by a qualified HVAC contractor. For use with natural gas furnace, natural gas boiler or air source heat pump only.		\$50	\$50		
	Single Package Vertical Unit, ≥ 90% Thermal Efficiency, NG, ≥ 10.0 EER Cooling		\$150	\$150		
	Single Package Vertical Unit, ≥ 90%+ Thermal Efficiency, NG		\$100	\$100		
Heat Pump	Focus on Energy approved Packaged Terminal Heat Pump. Enter Efficiency Rating: _____		\$100	\$100		
Heat Pump	ENERGY STAR® Certified Geothermal or Ground Source Heat Pump		\$750	\$750		
Windows	ENERGY STAR® rated windows (# of windows:); Attic insulation or Air Sealing required		\$0	\$0	\$100 each, Max \$400	
SUBTOTAL					Max \$3,000	

SUPPORT MEASURES

(Electrical upgrades, leaking roof, asbestos removal, oil tank removal, etc. necessary to complete above improvements. This category may not exceed 20% of the above subtotal.)

- A. TOTAL PROJECT COST:** _____
- B. FOCUS ON ENERGY INCENTIVE:** _____
- C. ME² BONUS INCENTIVE** (\$3,000 max): _____
- D. OUT OF POCKET COST** (paid by customer): _____
- E. REQUESTED SUMMIT PAYMENT:** _____
(\$15,000 max; subtract lines B, C & D 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: <https://datcp.wi.gov/Pages/Publications/HI-ConsumerTips136.aspx>
- 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 homeowner's 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:

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- 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.

FOR ME² BONUS INCENTIVES

- Me² Bonus Incentive to be mailed to homeowner
- Me² Bonus Incentive to be paid to installing contractor

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 Slipstream, 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: _____

If check is mailed to contractor: **Incentive Payment Reassignment** - Complete this section only if incentive will be paid to the Landlord or Contractor. IRS form W9 for Payee must be submitted for incentive reassignment.

Payee Name (as shown on attached W9): _____

Payee Phone: _____ Payee Email: _____

Mail Check to: W9 Address
 Alternate Pay Address

Alternate Pay Address (optional): _____ City: _____ State: _____ ZIP: _____

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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: _____