



ecoCITY of MILWAUKEE

# Residential Project Detail Form

## CONTACT INFORMATION:

Phone: 608-729-6808

Email: [ME2@slipsteaminc.org](mailto:ME2@slipsteaminc.org)

## Is your home drafty? Need to replace your furnace? Want lower energy bills?

Me2 is here to help with easy and affordable energy-saving upgrades such as insulation, air sealing, furnaces, boilers, hot water heaters, air conditioners, and now, windows. Me2 helps you take some of the dollars you are wasting on high energy bills and put them into energy-saving home improvements.

## APPLY

Summit Credit Union offers three convenient options to apply for a Me2 loan:

1. **Get pre-approved for a loan online.** Please note: The Me2 loan is listed under *Personal Loans*.
2. **Apply by phone at 1-800-236-5560.** Press 1 to apply for a loan.
3. **Apply in-person at 2159 Miller Park Way OR 345 West St. Paul Ave.** [Find all Summit Credit Union locations.](#)

A Summit lender will work with you on collecting this form, your contractor bid, and income verification to close the loan.

## SUBMIT

Send a copy of this form and your Me<sup>2</sup> Completion Certificate to: [Me2@Slipstreaminc.org](mailto:Me2@Slipstreaminc.org) or mail to: Me<sup>2</sup> Program, 431 Charmany Drive Madison, WI 53719. **Complete applications must be received within 60 days of installation.**

## 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 Me<sup>2</sup> program?

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



## SECTION 2: PROPERTY INFORMATION & ELIGIBILITY

Property Address (site of improvement, if different from above): \_\_\_\_\_

City: Milwaukee State: WI Zip: \_\_\_\_\_

### ELIGIBILITY

You are eligible for Me<sup>2</sup> 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 Me<sup>2</sup> loans only).
- No delinquent property taxes are due to the city of Milwaukee on the property (for Me<sup>2</sup> loans only)
- I will use a participating Me<sup>2</sup> 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](http://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 Me<sup>2</sup> 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)

Category	Description	Project Cost	Focus on Energy Incentives		Net Cost (Project Cost)
			Tier 1	Tier 2	
Air Sealing	ENERGY STAR® Qualified Air Sealing (Energy assessment required)		\$450	\$750	
Insulation	Attic Insulation		\$350	\$450	
Insulation	Foundation Insulation		\$100	\$150	
Insulation	Wall Insulation		\$300	\$300	
Insulation	Duct Sealing & Insulation		\$50	\$50	
Furnace	95% AFUE Single- or Multi-Stage Natural Gas		\$50	\$350	
Furnace	96% AFUE Single- or Multi-Stage Natural Gas		\$100	\$450	
Furnace	97%+ AFUE Multi-Stage Natural Gas		\$150	\$550	
Boiler	95%+ AFUE Natural Gas Home Heating Boiler		\$400	\$550	
Boiler	95%+ AFUE Natural Gas Combination		\$500	\$675	
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) <a href="#">*See Focus on Energy</a>		*Varies	*Varies	
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	
<b>SUBTOTAL</b>					

## 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. OUT OF POCKET COST** (paid by customer): \_\_\_\_\_
- D. REQUESTED SUMMIT PAYMENT:** \_\_\_\_\_  
(\$15,000 max; subtract lines B and C from line A above)

## SECTION 5: TERMS

By checking the box below, you are certifying the property's eligibility to receive Me<sup>2</sup> Financing and have read and understand the main terms of the program.

- I have read and understand the following terms of the Me<sup>2</sup> program.

The City of Milwaukee, the Me<sup>2</sup> program, and Summit Credit Union:

- Recommend you contact your contractor for detailed manufacturer equipment warranties.
- Read and adhere to the State's 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 Me<sup>2</sup> 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<sup>2</sup> program reserves the right to publicize participation in the program.
- A Me<sup>2</sup> 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.

## 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 Me<sup>2</sup> program and its affiliates, including Slipstream, City of Milwaukee, and U.S. 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 Me<sup>2</sup> 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.

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- 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 Me<sup>2</sup> 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: \_\_\_\_\_