



ecoCITY of MILWAUKEE

Residential Project Detail Form

CONTACT INFORMATION:

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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. A Me² loan helps 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 Me² loan online** on the Summit Credit Union website. **Click on Loans and then Energy.**
2. **Apply by phone at 1-800-236-5560.** Press 1 to apply for a loan and then press 3 to apply for a Me² loan.
3. **Apply in-person at the Summit Credit Union branch located at 10015 W. Greenfield Ave.**

After Summit pre-approves your loan, contact a Me² Contractor to: 1) Provide an estimate for the project and 2) Complete this form. The estimate and Me² Project Detail Form will be collected by Summit to determine the loan amount and terms. Then let your contractor know you're ready to schedule the project.

Go to milwaukee.gov/Me2 for program details and a list of approved Me² contractors that can provide an estimate for your energy-saving home improvements.

SUBMIT

Within 10 business days of project completion, work with your Me² Contractor to submit or email this Project Detail Form, along with the Me² Completion Certificate, to Summit Credit Union (EnergyLoans@summitcreditunion.com) to ensure payment is issued to your Me² Contractor

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 MailHow 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 REBATES

Focus on Energy provides rebates for specific energy saving improvements and you may be eligible for increased, Tier 2, rebates if your household's income level is less than the applicable 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

To confirm if you qualify, visit the Focus on Energy website at focusonenergy.com/Tier2 and follow the required steps to determine your eligibility for Tier 2 Rebates. Provide Focus' Tier 2 approval notification to your Me² contractor and work with them to complete Focus' 2022 Rebate Application(s) at focusonenergy.com/rebates. **Application and required supporting documentation must be submitted within 60 days of installation.**

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)		\$675	\$1,125	
Insulation	Attic Insulation		\$525	\$675	
Insulation	Foundation Insulation		\$150	\$225	
Insulation	Wall Insulation		\$450	\$450	
Insulation	Duct Sealing & Insulation		\$75	\$75	
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	
Central Air Conditioning	ENERGY STAR® Certified, SEER 14+ Enter Efficiency Rating: _____		\$0	\$0	
Boiler	95%+ AFUE Natural Gas Home Heating Boiler		\$400	\$550	
Boiler	95%+ AFUE Natural Gas Combination		\$500	\$700	
Air Source Heat Pump	15.2 SEER, 9.5 HSPF2 (propane, oil, natural gas, or electric furnace only) <i>*See Focus on Energy</i>		*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	
Heat Pump	ENERGY STAR® Certified Geothermal or Ground Source Heat Pump <i>*See Focus on Energy</i>		*Varies	*Varies	
Windows	ENERGY STAR® rated windows (# _____ of windows:); Attic insulation or Air Sealing required		\$0	\$0	
SUBTOTAL					

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/LOAN:** _____
(\$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 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 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 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:

- 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 Me² program and its affiliates, including 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 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.

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- 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 select the Make Check Payable To: Trade Ally 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: _____