



# California

## FinAnswer<sup>®</sup> Express 2012 Incentive Application Packet

Motor & Variable Frequency  
Drive Technologies

Heating, Ventilation, Air  
Conditioning (HVAC)  
Technologies

Building Envelope Technologies

Food Service Equipment  
Appliances

LED Refrigerated Case Lighting

Office Equipment

### ABOUT THE PROGRAM

***This application packet contains three parts:***

- FinAnswer Express Participant Information Form
- Terms and Conditions
- Equipment Incentive Worksheet

(This packet does not pertain to most FinAnswer Express lighting projects. Contact us or your vendor before you start a lighting project.)

***To get started, review the following steps:***

1. **Read** the Terms and Conditions (page 3).
2. **Locate** the qualifying equipment in the applicable Incentive Catalog, available at [pacificpower.net/wattsmart](http://pacificpower.net/wattsmart). Equipment specifications and descriptions, incentive eligibility requirements, and incentive amounts are listed in the catalogs. Some restrictions apply; please see the applicable Incentive Catalog. Technical assistance and custom incentives for equipment not listed in the Incentive Catalogs may be available. Please contact Pacific Power or your vendor before purchasing equipment.
3. **Order / Purchase and Install** qualifying equipment between January 1, 2012 and December 31, 2012. Except for custom measures, qualifying equipment must be installed before submitting your application. All applications must be postmarked by January 31, 2013 to be considered eligible.
4. **Complete the following forms available in this application packet:**
  - Complete the **FinAnswer Express Participant Information Form** (page 2). Be sure to include ALL required FinAnswer Express Participant information and Account Information.
  - Complete the **Equipment Incentive Worksheet** (page 4) and the appropriate **Application Supplement**, if applicable (see incentive catalog). Be sure to include all required information.
5. **Sign the following documents:**
  - The bottom of the Terms and Conditions (page 3), accepting the terms and conditions as stated.
  - If the incentive is to be paid to a party other than the Customer as provided on the Pacific Power bill or the facility owner, the *Payment Release Information* section of the **FinAnswer Express Participant Information Form** (page 2) **MUST** be completed and signed.
6. **Retain a copy** of all completed application forms and all required documentation, such as receipts and contracts, for your records. Submitted applications will become the property of Pacific Power.
7. **Mail** the completed forms and other required documentation to:

**FinAnswer Express Application Processing Center  
6312 SW Capitol Way #1023  
Portland, OR 97239**

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**IMPORTANT:** Please be sure to send the COMPLETED Application/Agreement (3 pages) along with copies of the required supporting documentation. Equipment must be purchased and installed at a qualifying facility within the state of California prior to submitting an incentive application (except for custom measures). Please allow 6 weeks for incentive processing. Please be sure to follow all eligibility requirements stated in the Incentive Catalogs. Incentives will not be paid for ineligible or incomplete applications.

### PROJECT SITE INFORMATION (Where equipment is installed)

Facility address (Where equipment is installed):	City:	State: <b>CA</b>	Zip:
Commercial/industrial electric account no. (where equipment is installed): _____ - _____			
Electric meter number – seven or eight digits: _____			

### FINANSWER EXPRESS PARTICIPANT INFORMATION

*(Check will be issued to the business name and address listed below unless the payment release section has been filled out and signed)*

FinAnswer Express Participant is (check all that apply):     Customer     Electricity User     Facility Owner

Participant business name (If account holder, as name appears on Pacific Power Bill):	Contact name:	Contact title:
Mailing address:	City:	State:    Zip:
Contact telephone number: (    )	Contact fax number: (    )	Contact email address:

### REQUEST FOR TAXPAYER IDENTIFICATION (Enter FinAnswer Express Participant information)

FinAnswer Express Participant business name shown on income tax return: \_\_\_\_\_

Federal taxpayer ID number (EIN) or SS#: \_\_\_\_\_

Please check the appropriate box:

Individual or Sole Proprietor     LLC, LLP or Partnership     Corporation     Trust/Estate     Exempt Payee

### INCENTIVE RELEASE INFORMATION (THIRD-PARTY INCENTIVE ASSIGNMENT)

**NOTE:** Complete this section only if incentive payment is to be directed to someone other than the FinAnswer Express Participant as indicated above.

Check should be made to the payee below:	Contact name:	Contact phone: (    )
Payee mailing address:	City:	State:    Zip:

I am authorizing this incentive payment to the third party named above and I understand that I will not be receiving the incentive payment check from Pacific Power. I also understand that my release of payment to the third party does not exempt me from the incentive requirements outlined in the application. FinAnswer Express Participant may be responsible for the tax reporting to the IRS of any incentive payments directed to third parties.

Authorized by (please <i>print</i> name & title)	Signature of Authorized	Date
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**For More Information** about the FinAnswer Express program, eligibility requirements, incentive levels or other general inquiries:

- Visit our website at [pacificpower.net/wattsmart](http://pacificpower.net/wattsmart) and submit your inquiry online
- Email us at [energy.expert@pacificpower.net](mailto:energy.expert@pacificpower.net) or
- Call our energy services hotline at **1-800-222-4335**

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## TERMS & CONDITIONS

**Qualifying Participants:** Eligible participants include commercial and industrial facility owners and electric customers whose facilities are within the State of California and who purchase their electricity from Pacific Power on one of the following retail general service schedules: **A-25, A-32, A-33, A-36, AT-47, AT-48, LS-53, LS-58, OL-42, PA-20**. Participants (other than electrical account holders) are responsible to provide documentation of ownership or of electricity usage at the eligible facility. Facility owner is defined as the person who has both legal and beneficial title to the real property, and is the mortgager under a duly recorded mortgage of real property, the trust or under a duly recorded deed of trust.

**Eligible Dates:** This 2012 Customer Incentive Application covers qualifying equipment purchased between January 1, 2012 and December 31, 2012. Incentive applications for 2012 installations must be postmarked by January 31, 2013. Applications received after this date may not be processed. Equipment must be purchased and installed prior to submitting an incentive application. For 2013 installations, visit our website at [pacificpower.net/wattsmart](http://pacificpower.net/wattsmart).

**Tax Liability:** Neither Pacific Power nor its Program Administrator is responsible for any tax liability which may be imposed on the Participant as a result of any incentive payment. Participant may be responsible for the tax reporting to the IRS of any incentive payments directed to third parties. Neither Pacific Power nor its Program Administrator is providing tax advice, and any communications to such parties is not intended to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.

**Incentive Limitations & Limitation of Damages:** Pacific Power does not warrant the performance of qualifying/installed equipment and does not warrant that the qualifying/installed equipment will deliver any specified amount of energy or cost savings. Customer shall independently evaluate the qualifying equipment. In no event will Pacific Power be liable for the failure of the Customer to achieve its expected amount of energy savings, for harm to Customer's facilities of any kind, or for any incidental or consequential damages of any kind in connection with installation of this qualifying equipment.

**Transfer of Environmental Attributes:** Customer hereby transfers to Pacific Power all "Environmental Attributes" attributable to the installation of the qualifying equipment or its operation. Environmental Attributes include any and all credits, benefits, emissions reductions, offsets and allowances, howsoever entitled, resulting from the avoidance of the emission of any substance to the air, soil or water at or by PacifiCorp generating facilities, through reduced generation of energy or other savings or offsets on account of the qualifying equipment. Customer will not claim ownership of any Environmental Attributes. As long as Customer at the same time states the installation of the qualifying equipment was made possible with funding from Pacific Power, Customer may claim that it is facilitating the production of the Environmental Attributes attributable to the qualifying equipment.

**Additional Details:** Incentive qualifications and amounts are subject to change and termination at any time. Visit the program's website, review the Incentive Catalogs or contact your local equipment dealer or Pacific Power for current program information. Pacific Power reserves the right to conduct random inspections to verify information provided on the application. After incentive payment, Pacific Power reserves the right to inspect qualifying equipment, which may include a telephone survey, site visit, and/or the installation of temporary monitoring equipment at any time up to 36 months after installation for quality control of the application or program performance evaluations.

Pacific Power issues FinAnswer Express incentives in the form of checks, not utility bill credits. Pacific Power is not responsible if your dealer provides inaccurate information about the amount and/or conditions of the actual incentive and Pacific Power will not pay incentives for equipment that is mislabeled or misrepresented by dealers regarding incentive qualifications. Qualifying equipment receiving incentives under the FinAnswer Express program may not receive purchase and installation incentives or credits under other Pacific Power programs. Please allow six weeks for your incentive check to arrive.

## ACCEPTANCE OF TERMS

By my signature below, I hereby certify that all information provided is accurate, including claims of customer and equipment information, and that the equipment associated with this incentive application has been purchased and installed. I have read the terms and conditions and agree to be bound by them and agree that Pacific Power may verify all the information provided. My signature below authorizes Pacific Power to provide my electric account information to contractors associated with the FinAnswer Express program.

**Certification of Taxpayer Identification:** Under penalties of perjury, I hereby certify that: 1) The number shown on page 2 of this form is my correct taxpayer identification number, and 2) I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and 3) I am a U.S. citizen, resident alien or other U.S. person.

\_\_\_\_\_  
Signatory Name & Title (please print)

\_\_\_\_\_  
Participant Signature

\_\_\_\_\_  
Date

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## EQUIPMENT INCENTIVE WORKSHEET

Please complete all the information requested in this form for each submitted equipment measure. Include additional sheets for additional equipment measures as necessary. Please refer to the appropriate Incentive Catalog(s) for the applicable Equipment Code and Measure Incentive, and any necessary Application Supplements. Please refer to your equipment invoice/receipt for Manufacturer and Model number information.

### INCOMPLETE APPLICATIONS WILL NOT BE ACCEPTED

Parameter	Measure 1	Measure 2	Measure 3
<b>Equipment Code</b>			
<b>Project Type</b> (Retrofit or New Construction)			
<b>Installation Date</b>			
<b>Equipment Location</b> (e.g. roof, mechanical room)			
<b>Dealer Name</b>			
<b>Manufacturer</b>			
<b>Model Number<sup>1</sup></b>			
<b>Serial Number</b>			
<b>AHRI Reference Number</b> (HVAC equipment only)			
<b>Efficiency Ratings</b> (Examples- A/C: EER + SEER/IEER Heat Pump (cooling): EER + IEER Heat Pump (heating): HSPF/COP)			
<b>Equipment Size</b> (e.g. 5 HP, 7 tons, 500 sqft, 50 Watts)			
<b>Measure Incentive (\$) per Unit</b> (e.g. HVAC - \$100/ton * 10 tons = \$1000; VFD - \$65/HP * 10 HP = \$650)			
<b>Number of Units</b>			
<b>Calculated Total Incentive (\$)</b> (# of Units * Measure Incentive/Unit)			

<sup>1</sup> For split system HVAC equipment, include the condenser model number and the evaporator coil model number

### **FINAL CHECK LIST**

- Did you read and understand the measure eligibility requirements in the applicable Incentive Catalog?
- Did you attach additional information if specified in the Incentive Catalog?
- Did you include a copy of the dated sales receipt/invoice with labor and material itemized?
- Did you include a copy of the Pacific Power bill for the address where the item(s) were installed?
- Did you complete the required information above?
- Did you attach a completed FinAnswer Express Participant Information Form (page 2) including your account number?
- Did you sign and attach the Terms and Conditions (page 3)?

**SEND COMPLETED APPLICATIONS WITH ATTACHMENTS TO:**  
**FinAnswer Express Application Processing Center**  
**6312 SW Capitol Way #1023**  
**Portland, OR 97239**