HOW TO APPLY

1. Read the Terms and Conditions included in this application.

2. Locate and read the specifications for the particular product(s) for which you are applying. Product specifications are listed in the applicable catalog and will indicate all product eligibility requirements.

Note: The chiller products require a pre-installation site inspection.

3. Do not order, purchase or install qualifying product(s) until you have received approval from CPAU. CPAU must approve application prior to installation of equipment.

4. Complete all applicable sections of the Commercial Advantage Program (CAP) Rebate Application. If the project requires a Title 24 submittal as part of the permit approval, the project is not eligible for CAP incentives.

5. Sign the following:
   a. The bottom of the “Rebate Application”, accepting the Terms and Conditions. This signature is required and must be in INK.
   b. When the rebate is to be paid to a party other than the Customer of Record as provided on the CPAU bill, the “Payment Release Authorization” section of the customer information form MUST be signed in INK.

6. Make and keep a copy of all completed application forms and all required documentation for your records. Submitted applications will become the property of CPAU.

8. All applications should be submitted within 90 days of purchase date.

7. Mail the complete forms and proof of purchase to:

City of Palo Alto Utilities
Utility Marketing Services
P.O. Box 10250
Palo Alto, CA 94303.

or bring the forms to:

Palo Alto City Hall
3rd floor, Utility Marketing Services
250 Hamilton Avenue, Palo Alto

www.cityofpaloalto.org/utilities

The Commercial Advantage Program is an energy efficiency incentive program for Commercial, Industrial and Public Sector customers located within the City of Palo Alto Utilities (CPAU) service territory paid for out of Public Benefits charges from CPAU ratepayers.
**PROOF OF PURCHASE REQUIREMENTS**

In order to receive a rebate, your application must be accepted before purchasing your equipment. Projects shall not commence until customer receives a written notice of acceptance from the City of Palo Alto Utilities.

Proof of purchase and supporting documentation must be submitted within 90 days of purchase date and must include all of the following information:

A. Retailer / Contractor name, address, and phone number,
B. Itemized listing of each product including quantity, product description, manufacturer, model number, or other identifying information i.e. SKU# as appropriate,
C. Purchase price per product,
D. Date “Paid in Full” or payment terms, and
E. Product installation date.

**READ THE PRODUCT SPECIFICATIONS INCLUDED IN THE APPROPRIATE CATALOG TO MAKE SURE ALL REQUIREMENTS ARE MET.**

For additional information on the status of your contractor's license, visit www.cslb.ca.gov or call the Contractor’s State License Board at 1-800-321-CSLB.

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**TERMS AND CONDITIONS: READ, SIGN, AND DATE BELOW**

Your business must receive electric service from the City of Palo Alto Utilities (CPAU). In order to receive a rebate, your application must be accepted before purchasing your equipment. Projects shall not commence until customer receives a written notice of acceptance from CPAU. CPAU reserves the right to reject any application that is incomplete or does not meet program criteria.

Eligible measures and corresponding rebate levels are listed in the Commercial Advantage Program Catalog. You are urged to consult your tax advisor concerning program incentives. CPAU is not responsible for taxes that may be imposed on your business as a result of your receipt of any financial incentives from CPAU.

**Agreement & Certification**

1. Customer’s company agrees to participate voluntarily in the CPAU Commercial Advantage Program.
2. Customer’s company certifies that it meets the program Eligibility Requirements and that the information with this agreement is true and correct to the best of their knowledge.
3. Customer’s company certifies that it has read and understands the project requirements listed in the Catalog, these Terms and Conditions, and the Agreement.
4. Customer’s company understands that participation in this program is subject to the acceptance of this application by CPAU and that CPAU makes specific incentive commitments only through a written notice of acceptance.
5. Customer’s company understands that it must complete their project(s) and provide copies of invoices as a prerequisite to receiving any reimbursement.
6. Customer’s company shall indemnify and hold harmless CPAU from any damage, loss, or liability that may arise from the undertaking of this project.
7. Customer’s company understands that if CPAU agrees to customer’s application, customer will receive a written notice of acceptance specifying the potential reimbursement amount, project deadline, and other terms.
8. Customer’s company understands that any changes to this agreement must be in writing and approved by CPAU.
9. Customer’s company understands that the incentive requires inspections and/or measurements of the performance of the measures. Therefore, customer’s company agrees to provide access to the project site for these purposes to CPAU and/or its agents.
10. Energy savings for which incentives are paid cannot exceed the actual usage provided by CPAU. Non-utility supply, such as cogeneration or deliveries from another commodity supplier, does not qualify as usage from CPAU.
11. Projects that require a Title 24 submittal as part of the permit approval are not eligible for rebates under the Commercial Advantage Program.
SUBMIT THIS PAGE FOR REBATE PROCESSING

Commercial Advantage Program

REBATE APPLICATION

CUSTOMER INFORMATION

Name as it appears on CPAU Bill

CPAU Account Number

Address where item(s) installed

Apt/Space #

City

State

Zip

Mailing address (if different from installation address)

City

State

Zip

Contact Name

Contact Telephone Number

Contact Fax Number

Email Address

PAYMENT RELEASE AUTHORIZATION

COMPLETE THIS SECTION ONLY IF PAYMENT IS GOING TO SOMEONE OTHER THAN THE CUSTOMER AS INDICATED ABOVE.

I AM AUTHORIZING THIS PAYMENT OF MY REBATE TO THE THIRD PARTY NAMED BELOW AND I UNDERSTAND THAT I WILL NOT BE RECEIVING THE REBATE CHECK FROM CPAU. I ALSO UNDERSTAND THAT MY RELEASE OF THE PAYMENT TO THE THIRD PARTY DOES NOT EXEMPT ME FROM THE REBATE REQUIREMENTS OUTLINED IN THIS APPLICATION.

Check should be made payable to:

AUTHORIZED BY: (Please Print)

Signature of Authorized

Date

Payee:

Individual/Business Name

Telephone Number

Payee Mailing Address

City

State

Zip

FOR THE BUSINESS RECEIVING THE REBATE, PLEASE PROVIDE THE FOLLOWING INFORMATION:

Tax Status:

Corporation

Partnership

Individual/Sole Proprietor

Exempt

Tax ID number:

EIN

Federal Tax ID

SSN: _______________________________

Tax Liability: Rebates are taxable if greater than $600 for business customers, and will be reported to the IRS unless you are exempt. CPAU will report your rebate as income to you on the IRS Form 1099 unless you have checked corporation or exempt tax status above. You are urged to consult your tax advisor concerning the taxability of rebates. CPAU is not responsible for any taxes that may be imposed on your business as a result of receipt of this rebate.

Rebate Product Information

Please fill in the information requested below. The product code, unit measure and rebate per unit can be found in the technology catalogs and refers to the item in which you are requesting your rebate. The manufacturer and model # are for the new products that you are installing at your facility.

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<tr>
<th>PRODUCT CODE (3 or 4 digits)</th>
<th>MANUFACTURER</th>
<th>MODEL #</th>
<th>INSTALL DATE</th>
<th>UNIT MEASURE (SQ. FT., HP, WATTS, TONS)</th>
<th>NUMBER OF UNITS A</th>
<th>REBATE PER UNIT B</th>
<th>REBATE TOTAL A XB = C</th>
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Total Rebate Due: __ __ __ __ __

Property Information

Please write below what best describes the main activity that takes place at your business, i.e. office, restaurant, manufacturing, hotel, retail, R&D etc.

Year Building Built: __________

Square Footage of Building: __________

Property Occupied by:

Owner

Tenant

Business Property Type Description: ________________________________________________________________________________________________

I HAVE READ AND UNDERSTAND THE TERMS AND CONDITIONS. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE PRODUCT(S) AND/OR EQUIPMENT(S) FOR WHICH I AM REQUESTING A REBATE MEETS THE REQUIREMENTS IN THIS APPLICATION.

Customer Name (Please Print)  Signature  Date

FOR UTILITY USE ONLY

Acct Rep  Database  Management  % Elec  % Gas  WBS#