

2010 – 2012 On-Bill Financing Application Third Party Implementer

This On-Bill Financing (OBF) Application for SCE Third Party Projects, along with a Project Feasibility Study must be submitted and approved **prior** to purchasing or installing your equipment. Approval of this Application does not guarantee funding. OBF Loan funding requires completed installation of equipment and fulfillment of all terms and conditions contained in this Application. Please read all terms and conditions of this Application carefully before signing, and contact your SCE representative for further information.

Customer Information	
Company/Business Name	
Company/Business Mailing Address	
Authorized Company/Business Representative Name	Title
SCE Account Representative Name	

Third Party Implementer (Consultant)	
Third Party Implementer Company Name	
Third Party Implementer Mailing Address	
Third Party Implementer Representative Name	Title

Authorized Payee Information ¹	
Authorized Payee Name	
Authorized Payee Mailing Address	
Authorized Payee Representative Name	Title

¹ Authorized Payee cannot be the Third Party Implementer

SEND TO: Southern California Edison, Business Incentives
P.O. Box 800, Rosemead, CA 91770-0800
Fax: 626-633-3243 | E-mail: BusinessIncentives@sce.com
Questions? 800-736-4777



Project Site Information

Please complete this table, indicating all the Service Account(s) included in your Energy Efficiency project. List each Service Account separately (i.e., one Service Account per line). The Service Accounts listed on this Table should match all the Service Accounts listed on the Incentive Application.

Service Account #	Customer Account #	Estimates		
		Project Cost	kWh Savings*	Incentive

*Only required for Customized measures

Program Description

The On-Bill Financing (OBF) program is offered by Southern California Edison Company (SCE) to qualified SCE non-residential service customers (Customer) to offset the cost of purchasing and installing eligible energy efficiency equipment (Solutions). Through OBF, qualified Customers will receive zero percent (0%) interest, no-fee, unsecured financing for Solutions for which incentives and rebates are approved under an eligible SCE energy efficiency program (Eligible Program).¹

Financing is available to qualified Customers for up to one hundred percent (100%) of the total approved, actual installed costs of approved Solutions, less rebates or incentives received from SCE under applicable Eligible Program(s). The minimum loan amount per service account available through OBF is five thousand dollars (\$5,000). The maximum OBF loan amount available per service account is (i) two hundred fifty thousand dollars (\$250,000) for government and institutional taxpayer-funded Customers, and (ii) one hundred thousand dollars (\$100,000) for commercial Customers,² including general business, industrial and agricultural entities.

Customers may qualify for multiple loans under OBF provided the aggregate dollar amount of the loans does not exceed the maximum OBF loan amount per service account stated above.³

The maximum loan term for a taxpayer-funded government or institutional Customer is ten (10) years (or the expected useful life⁴ of the installed Solutions, whichever is shorter). The maximum loan term for a commercial Customer is five (5) years (or the expected useful life of the installed Solutions, whichever is shorter). The monthly loan repayment amount will be approximately equal to the estimated monthly dollar savings Customer is expected to receive through their SCE utility bill due to the Solution's estimated energy savings.

The fixed monthly loan repayment will be invoiced as a line item on Customer's SCE bill. In no event will Customer be entitled to receive a loan amount in excess of one hundred percent (100%) of the total approved, actual installed Solution costs, less rebates or incentives received for such Solutions under the Eligible Program(s). If the projected loan term is beyond the OBF loan term limit or exceeds the installed Solutions' expected useful life, a loan of a lesser amount may be approved at SCE's sole discretion.

The OBF program has a limited budget. SCE will accept this On-Bill Financing Application (OBF Application) from qualified SCE Customers and will reserve funds on a first-approved, first-served basis until funds are depleted or the OBF program is terminated, whichever occurs first.

This OBF Application is for approval of a reservation of loan funds only. Issuance of OBF loan funds is conditioned on Customer's installation of approved Solutions in accordance with the selected Eligible Program(s), satisfaction of all Eligible Program requirements, and execution by Customer of the On-Bill Financing Loan Agreement.

The terms and conditions of SCE's OBF program may be modified or terminated without prior notice.

¹ Eligible Programs include SCE's Express Solutions (not yet installed) or Customized Solutions programs offered through SCE's Third Party Incentive Programs. See www.sce.com/onbill for details. Demand Response Technology Incentives Program is not an Eligible Program. To ensure eligibility of a planned Solution(s) please review the Express Solution and Customized Solutions eligibility requirements in the Energy Management Solutions Directory at www.sce.com/Solutions.

² A taxpayer-funded Customer is defined as a Customer using tax revenue to pay utility bills associated with a service account, included but not limited to cities, counties, public or state-funded schools, public libraries and government offices.

³ A taxpayer-funded Customer is allowed to designate one Service Account to receive loan amounts up to \$1 million, either as a single loan, or as a total of multiple loans for that Service Account.

⁴ The expected useful life (EUL) of a Solution is an average length of time a Solution may be operational, based on historical analysis. If more than one Solution is installed, the EUL of all installed Solutions will be that of the Solution which contributes the greatest kWh savings for the project.

Eligibility

To qualify for the OBF program, Customer must receive an incentive and/or rebate through SCE pursuant to an Eligible Program. Customer must satisfy all requirements of each selected Eligible Program, including but not limited to execution of such Eligible Program's incentive application (detailed below) and, if applicable, an Eligible Program agreement (see OBF Application Process, A. below). The applicable Energy Management Solutions Incentives Application(s) for Business Customers or Energy Management Solutions Incentives Application for State of California Partnership (both referred to as "Incentive Application") executed by Customer are hereby incorporated into this OBF Application by this reference. If there is any conflict between the terms and conditions of any Eligible Program Incentive Application and the terms and conditions of this OBF Application or On-Bill Financing Loan Agreement, the terms and conditions of this OBF Application and the On-Bill Financing Loan Agreement shall control.

The (i) 2010-2012 Third Party Implemented Program Agreement between Customer and the Third Party Implementer including the SCE Terms & Conditions signed by Customer (Incentive Program Agreement), and (ii) Customer's Project Feasibility Study (PFS) prepared by the Third Party Implementer pursuant to the Incentive Program, as approved by SCE, are hereby incorporated into this OBF Application by this reference. If there is any conflict between the terms and conditions of Incentive Program Agreement or the PFS and the terms and conditions of this OBF Application or the On-Bill Financing Loan Agreement, the terms and conditions of this OBF Application and the On-Bill Financing Loan Agreement shall control.

To qualify for the OBF program, Customer must also satisfy each of the following conditions:

- A. Customer must be an existing commercial, industrial, agricultural, government or institutional customer of SCE.
- B. Customer must have been an SCE customer in the same business (i.e., maintained an active SCE account) for at least 24 consecutive months prior to the start of participation in OBF.
- C. Customer must be in good credit standing with SCE including: (1) no disconnect notice in the past 12 months; (2) no 48-hour shut-off notices in the past 12 months; (3) no returned payments in the past 12 months; and (4) not have a deposit on its account to establish or reestablish credit in the past 12 months.

OBF Application Process

Applying customers must follow these steps:

- A. The Third Party Implementer must submit the PFS along with this 2010-2012 On-Bill Financing Application signed by Customer. Both the PFS and this OBF Application must be submitted through SCE's CRM system. SCE will use the PFS and this OBF Application to determine if Customer is eligible to participate in the OBF program based on Customer's SCE utility bill payment history and the incentive eligibility of the energy efficiency Project. Incomplete or incorrect applications cannot be processed. Scanned or facsimile signatures may be used for the purposes of enforcing the terms of this Application as though they were originals. Customer may withdraw this OBF Application for any reason by providing SCE with a written notice of such withdrawal.
- B. An SCE engineer or approved third party reviewer will review the Incentive Application, including an inspection of Customer's existing equipment. If the existing equipment has been removed, Customer's project will not be eligible for OBF funding, and may not qualify for an SCE rebate/incentive under an Eligible Program.

(continued)

⁵ For customers without capability to submit this OBF Application online, the Incentive Application and this OBF Application may be submitted by mail to Southern California Edison, Business Incentives, P.O. Box 800, Rosemead, CA 91770, by email to BusinessIncentives@sce.com or by fax to 626-633-3243.

OBF Application Process *(continued)*

- C. If Customer meets the OBF eligibility requirements and the proposed Project set forth in the PFS qualifies for rebates and/or incentives, then SCE will reserve OBF loan funds based on the approved PFS Projects. When the applicable requirements are met, SCE will consolidate multiple service accounts into one individual OBF loan to provide Customer with the convenience of only one OBF loan rather than multiple OBF loans. A reservation of funding does not guarantee loan funding. Funding shall occur only upon satisfaction of all requirements set forth in this OBF Application. If Customer's OBF Application is denied, SCE will provide the Third Party Implementer and Customer with a written statement of the specific reasons for the denial within 30 days of the denial.
- D. Upon notice from SCE of qualification for OBF and reservation of funding, Customer will schedule and install the SCE-approved Project(s) and when completed, shall submit to SCE a "Project Completion Certificate," along with any other documents required under the terms and conditions of the Incentive Program.
- E. SCE will complete a technical review, including a post-installation inspection of the eligible installed Project(s). The final loan amount will be re-calculated by SCE at final completion and approval of installation to reflect any changes in the actual installed costs, incentive amount, expected useful life, or estimated energy savings of the Project(s).
- F. Customer will review, sign, and have notarized the On-Bill Financing Loan Agreement provided by SCE specifying Customer's obligations for repayment and all other terms and conditions, and the Third Party Implementer shall scan and upload it into CRM.
- G. Upon receipt of the On-Bill Financing Loan Agreement and satisfaction of all remaining OBF program requirements and the selected Incentive Program requirements, SCE will process payment of Customer's OBF loan funds and issue a check payable to Customer (or the Authorized Payee designated in this OBF Application) to be sent by mail.
- H. The initial OBF monthly loan installment will appear on Customer's SCE bill within sixty (60) days of the effective date of the On-Bill Financing Loan Agreement and will continue for the term of the loan or until the loan balance is paid off, or as may otherwise be provided in the On-Bill Financing Loan Agreement.

DISCLAIMER: THE FEDERAL EQUAL CREDIT OPPORTUNITY ACT PROHIBITS CREDITORS FROM DISCRIMINATING AGAINST CREDIT CUSTOMERS ON THE BASIS OF RACE, COLOR, RELIGION, NATIONAL ORIGIN, SEX, MARITAL STATUS, AGE (PROVIDED CUSTOMER HAS THE CAPACITY TO ENTER INTO A BINDING CONTRACT); BECAUSE ALL OR PART OF CUSTOMER'S INCOME DERIVES FROM ANY PUBLIC ASSISTANCE PROGRAM; OR BECAUSE CUSTOMER HAS IN GOOD FAITH EXERCISED ANY RIGHT UNDER THE CONSUMER CREDIT PROTECTION ACT. THE FEDERAL AGENCY THAT ADMINISTERS COMPLIANCE WITH THIS LAW CONCERNING THIS CREDITOR IS THE FEDERAL TRADE COMMISSION, EQUAL CREDIT OPPORTUNITY, WASHINGTON, DC 20580.

Verification and Certification

I, Customer and applicant hereunder, and the Third Party Implementer, each separately affirm we have read, understand and agree to all of the specific OBF terms, conditions and other requirements and restrictions set forth in this OBF Application. Each of us separately certifies all of the information provided in this OBF Application is true, correct and complete. Each of us understands that Customer must meet all eligibility criteria and requirements of both the OBF program and the Incentive Program in order to participate in OBF. We understand SCE reserves the right to request additional information to verify Customer's eligibility in OBF.

Signature of Customer **X**

Date

Signature of Third Party Implementer **X**

Date

I, as Customer and applicant, further certify I have entered into a contract with said Third Party Implementer for engineering support and identification of energy efficiency Projects at the project site listed above. I understand: (1) SCE makes no warranty or representation about the Third Party Implementer's qualifications; (2) I am solely responsible for selecting the Third Party Implementer to implement the project on my behalf; (3) the Third Party Implementer is an independent contractor and not authorized to make any representations on behalf of SCE; and (4) SCE will have no role in resolving any disputes between me, the Third Party Implementer and/or any other third parties. I further authorize all contracts and correspondence to be sent directly to the Third Party Implementer specified above. I further authorize the Third Party Implementer to request and receive from SCE my Customer account information for the SCE account(s) listed in this Application, including billing records, billing history, meter usage date, verification of balances on the account(s), discontinuance notices, and verification of rate and related information, and to schedule any required inspections by SCE at the project site in connection with this OBF Application or the Incentive Program(s).

Signature of Customer **X**

Date

Form of Payment

- OBF Loan Funds to Customer
- OBF Loan Funds to Authorized Payee

Payment Release

As Customer, I authorize the payment of my OBF Loan Funds to the Authorized Payee specified above, and I understand I will not be receiving the OBF check from SCE. I also understand my release of this payment to the Authorized Payee does not exempt me from the requirements outlined in this OBF Application.

Signature of Customer **X**

Date

PLEASE MAKE A COPY OF THIS DOCUMENT FOR YOUR RECORDS

The OBF program is funded by California utility customers and administered by Southern California Edison under the auspices of the California Public Utilities Commission.