

PRINCE GEORGE'S COUNTY GOVERNMENT
Office of Central Services
Sustainable Energy
CLEAN ENERGY PROGRAM
INSTRUCTIONS FOR ENERGY EFFICIENCY GRANT APPLICATION

Introduction & Background

Thank you for your interest in the Prince George's County's Clean Energy Program, Energy Efficiency Grant award administered by the Office of Central Services, Sustainable Energy (OCS SE). Prince George's County is working to improve the quality of life in nine designated neighborhoods, classified as *Energy Resiliency Communities* (ERCs), while identifying ways to improve service delivery throughout the county for all residents.

The ERCs evolved from a County initiative, formerly known as Transforming Neighborhoods Initiative (TNI), which utilized several metric indicators such as education, public safety, and employment to identify key neighborhoods across the County needing holistic uplifting.

From an energy perspective, resiliency is the ability to prepare for and adapt to utility disruptions and recover quickly from these disruptions. This involves the deployment of distributed energy resources such as energy efficiency, renewable energy such as solar PV and thermal, battery storage, and microgrids.

This grant award builds on Maryland and Prince George's County's energy efficiency and carbon reduction goals and is designed to assist single-family residents in designated communities with becoming more energy efficient and installing solar on their homes.

This document provides instructions for filling out the Clean Energy Program, Energy Efficiency Grant application. If you have additional questions, please see the Clean Energy Program's contact information below to reach out to OCS Sustainable Energy staff.

Available Incentives

The Clean Energy Program, Energy Efficiency Grant award provides up to **\$7,500** in funds for residential energy efficiency measures, in addition to Pepco and Washington Gas incentives. **The maximum grant award amount is \$7,500 (for gas and electric incentives), of which \$5,000 can be allocated towards electric incentives and \$2,500 toward natural gas incentives, and up to 50% of total grant award amount (\$3,750) can be allocated towards air sealing and insulation (does not include ancillary equipment like baffles/ventilation).** The Energy Efficiency Grant award will cover the \$100 cost of the home energy assessment (amount included in total \$7,500).

Submission of an application for a grant award does not guarantee receipt of an incentive or the amount of the requested incentive. The Clean Energy Program operates on a first-come, first-served basis and incentive rebates are dependent upon cost effectiveness and funding availability.

Read and follow these step-by-step instructions to better navigate a successful application submittal:

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Step 1: CONFIRM YOUR ELIGIBILITY

To qualify for the grant award, residents must:

- I. Be a Prince George's County resident.
- II. Be a Pepco and/or be a Washington Gas customer.

To be eligible for this grant award, you will need to show **proof of being a Pepco customer**, as evidenced by a recent copy (within the last 3 months) of your electric utility bill if applying for electric incentives only; or be **both Pepco and Washington Gas customer** if applying for both electric and gas incentives. Paper copies of the bills are typically mailed to the customer address on record. For Pepco customers with internet access, account information is available via Pepco's account portal: <https://bit.ly/30W7LLd>, and Washington Gas customers can access their accounts via Washington Gas' account portal: <https://bit.ly/2mwTUWZ>.

- III. Live in a single-family, townhouse residence, or condominium* (please see Section II for more details) that is individually metered (built before March 23, 2016), in one of the following designated Energy Resiliency Communities (ERC): Bladensburg - East Riverdale; Forestville; Hillcrest Heights - Marlow Heights; Kentland - Palmer Park; Oxon Hill - Glassmanor; Silver Hill; Suitland - Coral Hills; Langley Park; and Woodlawn - West Lanham.

To confirm you are in one of the ERC communities, you must look up your address by using the ERC Address Locator: <https://bit.ly/3aZStLH>. Please note the ERC Address Locator is the definitive tool for determining the eligibility of an application.

Step 2: HOME ENERGY ASSESSMENT

The Energy Efficiency grant award builds on [EmPOWER Maryland](#), a state-wide initiative encouraging all Maryland homes and businesses to save energy and money with incentives. To participate in the Energy Efficiency Grant award, residents must first apply to one of the appropriate EmPOWER Maryland Program and have a home energy assessment conducted.

I. APPLY TO THE APPLICABLE EMPOWER MARYLAND PROGRAM

Participants of the Energy Efficiency Grant award are *required* to apply to the applicable EmPOWER Maryland incentive program, being considered either as 1.) Market rate; or 2.) Low-to-moderate-income (LMI):

- a. Market rate applicants participate in Pepco's Home Performance with ENERGY STAR Program (HPwES); while
- b. LMI qualified applicants utilize the Maryland Department of Housing and Community Development's (DHCD) Low Income Energy Efficiency Program (LIEEP).

Read more information about both program options below:

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A.) **The Home Performance with ENERGY STAR® Program** - Pepco provides incentives in rebates up to \$7,500. For only \$100**, get a comprehensive Home Energy Assessment from a trained, professional contractor, including no cost installation of energy savings products (i.e. LED light bulbs, electric hot water heater pipe wrap, ShowerStart™ showerhead adapter, efficient-flow showerheads, faucet aerators, and power strips) and details on potential improvements. This usually costs \$400**.

**The Energy Efficiency grant award will cover the \$100 cost of the home energy assessment.

For more information and to apply, call 1-866-353-5798 or visit:

<https://homeenergysavings.pepco.com/home-performance-with-energy-star-program> to schedule your audit with one of Pepco's pre-approved contractors or call 1-833-286-0860 for Washington Gas.

Pepco and Washington Gas' Efficiency Rebates, Incentives, and Programs provide different incentives to assist customers with using less energy, saving money and improving the environment. **A complete list of incentives/rebates offered are available on Pepco's website at <https://bit.ly/3b8ZQj4>, and can be found below.**

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Energy Efficiency Home Upgrade Rebates

Your rebate amount is based on estimated electric and gas savings of eligible upgrades. Estimated savings are determined as modeled by your Participating Contractor using Beacon HEA modeling software.

Eligible Home Upgrade	Required Installation Levels	Program Rebates*
Air Sealing†	Minimum 10% air leakage reduction	Rebate based on modeled energy savings from your Home Energy Assessment up to a maximum of \$7,500 or 75% of job cost; average project rebate is \$2,500
Attic Insulation	Ending R-value of R-49 or as space allows	
Attic Insulation (Slope)	R-value of R-30 or as space allows	
Attic Gable Walls	Ending R-value of R-13 or as space allows	
Kneewalls	Ending R-value of R-13 or as space allows	
Exterior Walls	Framing cavity filled with insulation; add R-5 insulated sheathing if siding is to be replaced	
Floor Insulation	Ending R-value of R-25 or as space allows	
Foundation Wall Insulation	≥ R-11 or as space allows; applied starting at top of wall and extended to at least frost line or further	
Rim Joist Insulation	≥ R-19 or as space allows	
Windows and Doors	ENERGY STAR rated	
Smart Thermostats	ENERGY STAR certified	\$100 rebate on up to 2 qualifying smart thermostats professionally installed by Participating Contractor
Duct Sealing Only	Duct sealing to be completed on both the supply and return side via program-approved sealing method	Rebates starting at \$500 up to project cap of \$7,500 or 75% of the project cost, as determined by performance-based rebates
Duct Sealing Included with Attic Air Sealing and Insulation	Duct sealing to be completed on both the supply and return side via program-approved sealing method	Rebates starting at \$750 up to project cap of \$7,500 or 75% of the project cost, as determined by performance-based rebates

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HVAC Equipment Upgrade Rebates

Your rebate amount is based on estimated electric and gas savings of eligible measures. Estimated savings are determined as modeled by your Participating Contractor using Beacon HEA modeling software.

HVAC Equipment Type	Efficiency Level	Program Rebates*
Central Air Conditioner Tier 1	≥ 16 SEER and ≥ 12.5 EER	Rebates starting at \$300 up to project cap of \$7,500 or 75% of the project cost, as determined by performance-based rebates
Central Air Conditioner Tier 2	≥ 18 SEER and ≥ 12.5 EER	Rebates starting at \$500 up to project cap of \$7,500 or 75% of the project cost, as determined by performance-based rebates
Air Source Heat Pump Tier 1	≥ 16 SEER and ≥ 12.5 EER and ≥ 9.0 HSPF	Rebates starting at \$400 up to project cap of \$7,500 or 75% of the project cost, as determined by performance-based rebates
Air Source Heat Pump Tier 2	≥ 18 SEER and ≥ 12.5 EER and ≥ 9.5 HSPF	Rebates starting at \$650 up to project cap of \$7,500 or 75% of the project cost, as determined by performance-based rebates
Geothermal Heat Pump (Ground Source, Closed Loop)	≥ 17.1 EER and ≥ 3.6 COP	Rebates starting at \$1,500 up to project cap of \$7,500 or 75% of the project cost, as determined by performance-based rebates
Ductless Mini-Split Heat Pump	≥ 18 SEER and ≥ 12.5 EER and ≥ 9.0 HSPF	Rebates starting at \$250 up to project cap of \$7,500 or 75% of the project cost, as determined by performance-based rebates
Ductless Multi-Zone Heat Pump	≥ 15.5 SEER and ≥ 12.5 EER and ≥ 8.6 HSPF	Rebates starting at \$400 up to project cap of \$7,500 or 75% of the project cost, as determined by performance-based rebates
Natural Gas Furnace [§]	≥ 95.1 AFUE with ECM	Rebates starting at \$400, based on estimated natural gas savings
Natural Gas Boiler [§]	≥ 95 AFUE	Rebates starting at \$700, based on estimated natural gas savings

*All HVAC equipment incentives obtained through the Home Performance with ENERGY STAR Program require a Home Energy Assessment and rebate reservation filed by your Participating Contractor. The completed scope of work must include attic insulation (R-49) and attic air sealing, or must be deemed unnecessary by an approved Participating Contractor. If you apply for rebates on heating and cooling equipment under the Home Performance with ENERGY STAR Program, you cannot apply for rebates on the same equipment under the Heating and Cooling Equipment Rebate Program.

[†]Each customer is eligible for one program-discounted Home Energy Assessment per unique street address.

[‡]All air sealing must be completed in compliance with the ANSI/BPI-1100-T-2014/1200-S-2015 and BPI Building Envelope Professional Standards, prioritized to reduce stack effect and inhibit moisture migration into attics or other interstitial spaces. Air sealing must be completed prior to installing insulation. Projects may also be subject to mechanical ventilation installation in compliance with ASHRAE 62.2-2013 Standards in order to ensure acceptable indoor air quality is achieved.

[§]Available only for Washington Gas customers.

Note: All water heater incentives obtained through the Home Performance with ENERGY STAR Program require a Home Energy Assessment and rebate reservation filed by your Participating Contractor. If you are applying for rebates through the Home Performance with ENERGY STAR Program, you cannot apply for rebates on the same equipment under the Appliance Rebate Program.

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Water Heater Replacement

Water Heater Type	Efficiency Level	Rebate
Hybrid Water Heater	ENERGY STAR certified	Rebate based on estimated electricity savings up to 75% of total project cost; eligible only when replacing an existing electric water heater
Storage Tank Gas Water Heater [§]	≥ 0.69 UEF	Rebates starting at \$150, based on estimated gas savings
Tankless Gas Water Heater [§]	≥ 0.89 UEF	Rebates starting at \$400, based on estimated gas savings

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B.) **The EmPOWER Maryland Low Income Energy Efficiency Program (LIEEP)** helps with repairs and upgrades to homes, which can significantly reduce energy use throughout the year. The program is available *at no charge* to income-qualified households. To be eligible for the LIEEP, household income for applicants in the ERCs must be below the following income limits:

Size of Family Unit	Maximum Annual Household Income*	Monthly Gross Income
1	\$25,520.00	\$2,126.67
2	\$34,480.00	\$2,873.33
3	\$43,440.00	\$3,620.00
4	\$52,400.00	\$4,366.67
5	\$61,360.00	\$5,113.33
6	\$70,320.00	\$5,860.00
7	\$79,280.00	\$6,606.67
8	\$88,240.00	\$7,353.33
each additional person	add \$8,960	
<p style="text-align: center;">Effective 1/30/2020</p> <p style="text-align: center;">*Your total household income must be below the amount listed for the number of residents in your household. Household income includes income from all residents 18 or over, including salaries and wages, retirement income, food stamps and investment income. For households with more than 8 persons, add \$8,960 for each additional person.</p>		

For more information on the LIEEP and to pre-apply, contact:

Maryland Department of Housing and Community Development

Housing and Building Energy Programs

<http://www.dhcd.maryland.gov/Residents/Pages/lieep/default.aspx>

7800 Harkins Road, Lanham, MD 20706

Toll Free (Maryland Only): 1-855-583-8976

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II. SELECT A CONTRACTOR TO CONDUCT A HOME ENERGY ASSESSMENT & RECEIVE AUDIT REPORT/PLOM

The above-mentioned EmPOWER Maryland programs provide incentives for homeowners to have a home energy assessment performed on their properties to identify energy savings associated with the project that is to be funded.

As a part of the Energy Efficiency Grant award, we expect contractors on behalf of the applicant to achieve no less than 15% energy savings for energy efficiency grant award applications (for natural gas and electric incentives). The minimum to qualify for standalone electric incentives is 10%.

Incentives	Savings	
Electricity incentives	10% energy savings	10% cost savings
Electricity and natural gas incentives	15% energy savings	15% cost savings

Energy efficiency service providers provide services and expertise to customers interested in making their properties more energy efficient. There are several ways to locate a service provider. See the [Finding a Service Provider](#) section of this document. Call one of the listed contractors to schedule your energy audit!

In order for a company to become a participating contractor as a part of the Clean Energy Program, the company *must* be [registered as a vendor of Prince George's County](#) with the Contract Administration and Procurement Division. This ensures more secure and efficient transactions between companies/suppliers and the County.

➤ To begin, the vendor registration form can be found here: <https://erpvendorapp.sap.mypgc.us>.

If you have further questions about vendor registration, please contact Betty Carter in Contract Administration and Procurement at 301-883-6400.

Rather than focusing on individual components, a home energy assessment (also known as an energy audit) looks at how a combination of improvements – *a whole home approach* - can result in a more comfortable home, as well as lower energy consumption and costs. A certified contractor uses diagnostic equipment to conduct a home energy assessment, including a complete visual inspection and diagnostic tests. Applicants must provide a copy of the home energy assessment report, which includes recommended improvements, suggested health and safety measures specific to your home, as well as projected energy savings in a *Prioritized List of Measures* (also known as a PLOM).

***For traditional styled condominiums**, eligible measures funded differ from other housing types. The installation of ENERGY STAR certified appliances is eligible for funding. Air sealing and insulation, unfortunately at this time, are not a part of the list of eligible measures for grant award funding since

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the whole structure is not always owned entirely by the applicant. In this case, EmPOWER Maryland will not provide the \$300 incentive for the energy audit but will provide rebates/discounts as incentives on appliances based on performance savings. Consequently, the applicant may submit a QHEC audit report in lieu of the Home Performance with ENERGY STAR audit identifying the appliances they would like grant award dollars to fund along with a copy of the applicable Pepco rebate forms. Applicants should also provide links to or a copy of the documents needed to verify energy savings in both dollars and kWh.

Step 3: SUBMIT PREQUALIFICATION REQUIRED DOCUMENTS

PREQUALIFICATION

Apply for the Energy Efficiency grant award and submit the required documents to the Office of Central Services, Sustainable Energy.

**SECTION A: REQUIRED ATTACHMENTS &
SECTION B: APPLICANT INFORMATION**

Working along with the selected contractor, email or send in copies of:

- ☐ **A copy of recent (within 3 months) energy bill for the property.**
 - Electric utility: If applying for electric incentives, you need to show proof of being a Pepco customer, as evidenced by a recent (within the last 3 months) copy of your electric utility bill. Paper copies of the bill are typically mailed to the customer address on record. For customers with internet access, account information is also available via the "My Account" (<https://bit.ly/30W7LLd>) portal on Pepco's website.
 - Gas utility: If also applying for gas incentives/rebates, you will need to show proof that you are a **Washington Gas** customer, as evidenced by a recent (within the last 3 months) copy of your gas utility bill. Paper copies of the bill are typically mailed to the customer address on record. For customers with internet access, account information is also available via the "My Account" (<https://bit.ly/2mwTUWZ>) portal on Washington Gas' website.
- ☐ **A copy of the home assessment report or the home energy audit report.**
- ☐ **Proof of having applied to one of the EmPOWER Maryland incentive programs.** Sufficient documents include a copy of the application to the program, a PLOM or one of the following:
 - i. For Pepco's residential energy-efficiency incentives ([Home Performance with ENERGY STAR Program](https://homeenergysavings.pepco.com/home-performance-with-energy-star-program)):¹

¹ <https://homeenergysavings.pepco.com/home-performance-with-energy-star-program>

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- A copy of the final project approval letter that indicates the incentives provided for the project.
- ii. For Maryland DHCD's [Low Income Energy Efficiency Program](#) (LIEEP):²
 - A copy of the QC inspection form that lists the work that was performed in the home.
- ☐ **A copy of contract or *itemized* scope of work with cost to install, remedy, or perform measures needed to address findings in the audit.** This is to include the AHRI certificate, model number(s), Energy Star certificate/label, AFUE, UEF, SEER, CER, etc. for all HVAC³ equipment, and AHRI certificate, model number and Energy Star certificate/label for water heater equipment that is requesting grant award funds.
- ☐ **IRS Form W-9: Request for Taxpayer Identification Number and Certification;** <https://www.irs.gov/pub/irs-pdf/fw9.pdf>. Sign and submit. Homeowners have two options when selecting who the grant award check would go to: the homeowner or the selected contractor. This is a requirement for the party that the check is to be awarded to; whomever is to receive the check is the party required to submit their W-9 form. If the selected contractor is to receive the check, homeowners do not have to submit a W-9 but the contractor company has to submit a W-9 form for the project.
- ☐ **The completed and signed Affidavit of Income;**
 - ⇒ Completion of *all* information (including number of people in household and annual gross income) and signature on form is a grant award requirement. Any information you provide will be kept completely confidential. Please note the funding source (Exelon/PHI merger) for this grant award requires we spend a certain portion of the funds with low- and moderate-income residents. Consequently, we are unable to determine compliance with this requirement without asking for income information. A dated witness to the signature is required.
- ☐ **The signed Terms and Conditions Agreement.**

SECTION C: DETAILED INCENTIVE INFORMATION

Applicants are encouraged to leverage other incentives, grant awards, and funding sources to save money and make their homes more energy efficient. List and attach the applications, grant award letters, and/or other documentation related to additional incentives that will be applied to the project.

² <http://dhcd.maryland.gov/Residents/Pages/lieep/default.aspx>

³ Units must be ENERGY STAR certified, and meet at least a 16 SEER/13 EER. For heat pumps, specifications must demonstrate at least a 16 SEER/13 EER/9 HSPF (Heating Seasonal Performance Factor). For Tier 2 furnaces, specifications must demonstrate at least 95.1% AFUE; Tier 2 tankless water heaters must be at a minimum UEF 0.89; Tier 2 storage water heaters must be at a minimum UEF 0.69; and Tier 2 boiler at a minimum 95% UEF.

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PREQUALIFICATION TIMELINE:

Note: The Energy Efficiency Grant application approval timeline is as follows but we reserve the right to modify this timeline:

- Prequalification letters will be issued within 15 business days of receipt of **a complete application**. The clock starts when we receive all required application documents.
- Work should be completed and an invoice submitted within 90 days of receiving prequalification approval notification. Applicant may request a onetime extension; the total time-period the grant can remain valid, including any extensions, shall not exceed six (6) months. The County is not required to grant award an extension.
- Final approval of application and site visit (if applicable) will occur within 10 business days of receipt of invoice.
- Upon submitting request for payment, the Office of Finance will approve invoices within 30 business days.

Step 4: SUBMIT FINAL REQUIRED DOCUMENTS

FINAL APPROVAL

Working along with the selected contractor, email or send in copies of:

- ☐ **A copy of the HPwES Reservation of Fund email** and test-out form.
- ☐ Final invoice that itemizes all work completed (including AHRI Statement, Brand/Model/Serial Numbers for grant-funded equipment); Included should be the job completion date; and
- ☐ Proof of any necessary electrical, plumbing, mechanical, or other permits.

FINDING A SERVICE PROVIDER

The information below is provided as a courtesy to applicants of the Energy Efficiency Grant award, and should not be considered an endorsement of any company or organization.

Prince George's County's Supplier Development and Diversity Division (SDDD) maintains a directory of certified Prince George's County suppliers as providers of goods & services and/or contractors. SDDD strongly believes the certified firms in each directory have the skill and capability to deliver quality services and products. Applicants can visit <https://www.princegeorgescountymd.gov/1315/Supplier-Directories> or call 301-883-6480 for assistance.

The list of participating contractors for the Home Performance with ENERGY STAR Program that serve Prince George's County is available here: (<https://homeenergysavings.pepco.com/home-performance-with-energy-star-program/overview/participating-contractors>) and is reproduced below for your convenience.

Contact one of the Home Performance with Energy Star contractors below to set up your home energy audit and inform them that you are interested in participating in the Energy Efficiency Grant award. Please note that not all contractors listed below are registered as a vendor with the County. In order

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to be eligible for the grant award, your selected contractor must be registered as a vendor with the County.

<p><u>A Hight on Homes LLC</u> 3640 Dalrymple Rd Chesapeake Beach, MD 20732 PHONE: 443-404-7699 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, HVAC Service/Repair, Comprehensive Remodeling, Insulation, Lighting</p>	<p><u>A Shepherd Design and Construction</u> 16701 Melford Blvd. Bowie, MD 20715 PHONE: (240) 544-5591 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, HVAC Service/Repair, Comprehensive Remodeling, Insulation, Lighting</p>
<p><u>Accurate Insulation, LLC</u> 15121 Marlboro Pike Upper Marlboro, MD 20772 PHONE: (301) 627-6506 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Insulation</p>	<p><u>Advanced Green Home Solutions</u> 1125 West Street, Suite 421 Annapolis, MD 21401 PHONE: 410-212-1051 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, HVAC Service/Repair, Comprehensive Remodeling, Insulation, Lighting</p>

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<p><u>AFC INTEGRITY ENERGY LLC</u> 12410 Milestone Center Dr Suite 600 Germantown, MD 20876 PHONE: (240) 423-3969 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, HVAC Service/Repair, Comprehensive Remodeling, Insulation, Lighting</p>	<p><u>American Home Performance, LLC</u> 502 East Franklin Ave Silver Spring, MD 20901 PHONE: (240) 743-7115 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, HVAC Service/Repair, Comprehensive Remodeling, Insulation, Lighting</p>
<p><u>Atlas Home Energy Solutions</u> 5108 Pegasus Ct, Suite A Frederick, MD 21704 PHONE: (240) 575-9104 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Insulation</p>	<p><u>BGE HOME</u> 1409-A Tangier Dr Middle River, MD 21220 PHONE: (888) 243-4663 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Water Heating, HVAC Service/Repair, Insulation, Lighting</p>

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<p><u>Building Energy Pros</u> PO Box 4225 West McLean, VA 22103 PHONE: (240) 252-5292 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Insulation, Lighting</p>	<p><u>C.A.R.E. Property Services, Inc.</u> 18804 Luray Court Olney, MD 20832 PHONE: 717-634-3060 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, HVAC Service/Repair, Comprehensive Remodeling, Insulation, Lighting</p>
<p><u>Complete Home Solutions, LLC</u> 235 W Bay Front Road Lothian, MD 20711 PHONE: (410) 867-1202 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, HVAC Service/Repair, Comprehensive Remodeling, Insulation, Lighting</p>	<p><u>CroppMetCalfe</u> 8421 Hilltop Road Fairfax, VA 22031 PHONE: (703) 698-8855 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, HVAC Service/Repair, Insulation</p>

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[Devere Insulation Home Performance](#)

7501 Resource Ct
Curtis Bay, MD 21226

PHONE:

(443) 770-1111

COUNTIES SERVED:

Montgomery, Prince George's

SERVICES:

Home Energy Audit/Test-out, Air Sealing,
Duct Sealing, Insulation

[EcoMize USA, LLC](#)

126 Church Lane
Cockeysville, MD 21030

PHONE:

410-446-7283

COUNTIES SERVED:

Montgomery, Prince George's

SERVICES:

Home Energy Audit/Test-out, Air Sealing,
Duct Sealing, Water Heating, HVAC
Service/Repair, Insulation, Lighting

[EDGE Energy](#)

6854 Distribution Drive
Beltsville, MD 20705

PHONE:

(888) 586-3343

COUNTIES SERVED:

Montgomery, Prince George's

SERVICES:

Home Energy Audit/Test-out, Air Sealing,
Duct Sealing, Water Heating, HVAC
Service/Repair, Comprehensive
Remodeling, Insulation, Lighting

[Efficient Home, LLC](#)

3905 National Drive, Suite 105
Burtonsville, MD 20866

PHONE:

(301) 476-7680

COUNTIES SERVED:

Montgomery, Prince George's

SERVICES:

Home Energy Audit/Test-out, Air Sealing,
Duct Sealing, Water Heating, HVAC
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Elysian Energy, LLC

14300 Cherry Lane Court, Suite 214
Laurel, MD 20707

PHONE:

(240) 424-0523

COUNTIES SERVED:

Montgomery, Prince George's

SERVICES:

Home Energy Audit/Test-out, Air Sealing,
Duct Sealing, Insulation

Ener G, LLC

3900 Briars Rd
Olney, MD 20832

PHONE:

(301) 363-1148

COUNTIES SERVED:

Montgomery, Prince George's

SERVICES:

Home Energy Audit/Test-out, Air Sealing,
Duct Sealing, Water Heating, HVAC
Service/Repair, Comprehensive
Remodeling, Insulation, Lighting

Energy Efficiency Experts

9327 Fraser Avenue
Silver Spring, MD 20910

PHONE:

(202) 557-9200

COUNTIES SERVED:

Montgomery, Prince George's

SERVICES:

Home Energy Audit/Test-out, Air Sealing,
Duct Sealing, Water Heating, HVAC
Service/Repair, Comprehensive
Remodeling, Insulation, Lighting

Energy Services Group

7483 Candlewood Rd., Suite G
Hanover, MD 21076

PHONE:

(410)-760-4801

COUNTIES SERVED:

Montgomery, Prince George's

SERVICES:

Home Energy Audit/Test-out, Air Sealing,
Duct Sealing, Insulation, Lighting

PRINCE GEORGE'S COUNTY GOVERNMENT
Office of Central Services
Sustainable Energy
CLEAN ENERGY PROGRAM
INSTRUCTIONS FOR ENERGY EFFICIENCY GRANT APPLICATION

<p><u>Future Green Services</u> 2020 F St NW Suite 524 Washington, DC 20006 PHONE: (443) 496-2655 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, HVAC Service/Repair, Insulation, Lighting</p>	<p><u>Glenmont Heating & Air Conditioning</u> 2267 Lewis Ave Rochville, MD 20851 PHONE: (301) 468-2665 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, HVAC Service/Repair, Insulation</p>
<p><u>Green Step</u> 14801 Rolling Green Way N. Potomac, MD 20878 PHONE: (301) 330-6600 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Comprehensive Remodeling, Insulation</p>	<p><u>Greenworks Systems, LLC</u> 9124 Belair Rd Perry Hall, MD 21236 PHONE: (443) 604-3161 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Comprehensive Remodeling, Insulation, Lighting</p>
<p><u>Home Energy HERO, LLC</u> PO Box 121 Clarksville, MD 21209 PHONE: (888) 490-4376 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, Insulation, Lighting</p>	<p><u>Home Energy Saving Solutions</u> 5208 Ernie Lane Kensington, MD 20895 PHONE: (301) 580-4683 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Insulation</p>

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<p><u>James A. Wheat & Sons, Inc.</u> 7834 Beechcraft Ave Gaithersburg, MD 20879 PHONE: (301) 670-1944 COUNTIES SERVED: Montgomery SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, HVAC Service/Repair, Comprehensive Remodeling, Insulation, Lighting</p>	<p><u>Live Green, LLC</u> 4318 Curtis Road Chevy Chase, MD 20815 PHONE: (301) 652-5272 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Insulation</p>
<p><u>Minnick's ecobeco</u> 5200 Minnick Rd Laurel, MD 20707 PHONE: 888.483.5740 240.396.2141 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, HVAC Service/Repair, Comprehensive Remodeling, Insulation, Lighting</p>	<p>Son-Rise Energy Conservation LLC 1088 Poole Road Hedgesville, WV 25427 PHONE: (443) 506-7188 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Insulation</p>

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<p><u>Superior Energy Solutions</u> 8713 Cowenton Avenue Perry Hall, MD 21128 PHONE: 410-256-3839 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, HVAC Service/Repair, Comprehensive Remodeling, Insulation, Lighting</p>	<p><u>Tristate Home Services</u> 82 A Wormans Mill Ct. Frederick, MD 21701 PHONE: 301.624.5970 COUNTIES SERVED: Montgomery SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Water Heating, HVAC Service/Repair, Insulation, Lighting</p>
<p><u>York Home Performance</u> 1052 Mt Rose Ave York, PA 17403 PHONE: 717-586-5884 COUNTIES SERVED: Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Insulation, Lighting</p>	<p><u>Zerodraft</u> 113 West Road, Suite 101 Towson, MD 21204 PHONE: (410) 321-5936 COUNTIES SERVED: Montgomery, Prince George's SERVICES: Home Energy Audit/Test-out, Air Sealing, Duct Sealing, Comprehensive Remodeling, Insulation, Lighting</p>

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Return application along with requested documents to:

Prince George's County, Office of Central Services, Sustainable Energy
1400 McCormick Drive, Suite 281 Largo, MD 20774

Email: CleanE@co.pg.md.us

For more information, call: [301-883-6450](tel:301-883-6450)

Please note: OCS Sustainable Energy does not endorse, sponsor, or otherwise make any representation or warranty with respect to any contractor or the work, materials, or services provided by any contractor.

PRINCE GEORGE'S COUNTY GOVERNMENT
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CLEAN ENERGY PROGRAM
ENERGY EFFICIENCY GRANT APPLICATION

The Clean Energy Program, Energy Efficiency Grant award joins ongoing efforts and programs created by Prince George's County to uplift neighborhoods that face significant economic, health, public safety, and educational challenges. This Energy Efficiency Grant award, coupled with state energy incentives, provides assistance to residents to adopt energy efficiency measures in nine designated neighborhoods, classified as *Energy Resiliency Communities* (ERCs).

The ERCs evolved from a County initiative, formerly known as Transforming Neighborhoods Initiative (TNI), which utilized several metric indicators such as education, public safety, and employment to identify key neighborhoods across the County needing holistic uplifting.

From an energy perspective, resiliency is the ability to prepare for and adapt to utility disruptions and recover quickly from these disruptions. It involves the deployment of distributed energy resources such as energy efficiency, renewable energy such as solar photovoltaic and thermal, battery storage, and microgrids.

This grant award, coupled with state energy incentives, provides assistance to residents to install energy efficiency measures in their homes.

A. CONFIRM YOUR ELIGIBILITY

Applicants of the grant award must:

- Be a Prince George's County resident;
- **Be a Pepco customer** (as evidenced by a copy of your recent Pepco bill) if applying for electric incentives only; or be **both a Pepco and Washington Gas customer** if applying for both electric and gas incentives;
- Live in a single-family, townhouse residence, or condominium¹ that is individually metered, built before March 23, 2016, and in one of the following designated ERCs: Bladensburg - East Riverdale; Forestville; Hillcrest Heights - Marlow Heights; Kentland - Palmer Park; Oxon Hill - Glassmanor; Silver Hill; Suitland - Coral Hills; Langley Park; and Woodlawn - West Lanham.

Applicants for the Energy Efficiency Grant award can satisfy this condition with the address on record as shown on the recent copy of the electric utility bill. To confirm you are in one of the ERC communities, you must look up your address by using the ERC Address Locator: <https://bit.ly/3aZStLH>. Please note the ERC Address Locator is the definitive tool for determining the eligibility of an application. You must drill in to ensure your address is within the ERC boundary.

¹ ***For traditional styled condominiums**, eligible measures funded differ from other housing types. The installation of ENERGY STAR certified appliances is eligible for funding. Air sealing and insulation, unfortunately at this time, are not a part of the list of eligible measures for award funding since the whole structure is not always owned entirely by the applicant. In this case, EmPOWER Maryland will not provide the \$300 incentive for the energy audit but will provide rebates/discounts as incentive on appliances based on performance savings. Consequently, the applicant may submit a QHEC audit report in lieu of the Home Performance with ENERGY STAR audit identifying the appliances they would like award dollars to fund along with a copy of the applicable Pepco rebate forms. Applicants should also provide links to or a copy of the documents needed to verify energy savings in both dollars and kWh.

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B. CONDUCT A HOME ENERGY ASSESSMENT

1. Apply to applicable EmPOWER Maryland incentives program;
2. Perform a home energy assessment;
3. Achieve at least 10% electricity and 10% cost savings for electric incentives; or 15% energy and 15% cost savings for both electric and natural gas incentives, shown on the audit report.

Incentives	Savings	
Electricity incentives	10% energy savings	10% cost savings
Electricity and natural gas incentives	15% energy savings	15% cost savings

4. Apply for the Energy Efficiency Grant award (electric or electric and gas incentives), and submit the prescribed documents that are required.

C. REQUIRED FOR PREQUALIFICATION

- ☐ A copy of recent (i.e. within 3 months) electric utility bill, if applying for electric incentives;
- ☐ A copy of recent (i.e. within 3 months) electric and gas utility bill, if applying for both electric and gas incentives;
- ☐ A copy of the home energy assessment/audit report and recommendations;
- ☐ Proof of having applied to one of the EmPOWER Maryland incentive programs;
- ☐ An itemized signed copy of contract and scope of work (SOW) with cost to install, remedy, or perform measures needed to address findings in the audit;
- ☐ IRS Form W-9: Request for Taxpayer Identification Number and Certification;
- ☐ The completed and signed Affidavit of Income; and
- ☐ The completed and signed Terms and Conditions Agreement.

D. REQUIRED FOR FINAL APPROVAL

- ☐ HPwES Reservation of Funds correspondence and test-out form;
- ☐ Final invoice that itemizes all work completed, to include job completion date (including AHRI Statement, Brand/Model/Serial Numbers for grant funded equipment); and
- ☐ Proof of any necessary electrical, plumbing, mechanical, or other permits.

GRANT AWARDS AGREEMENT/TERMS & CONDITIONS

All grant award applicants ("Awardee") who seek to claim awards and/or incentives under Sustainable Energy's Energy Efficiency Grant award ("SE Energy Efficiency") are required to acknowledge reading and understanding the following terms and conditions and must accept these terms and conditions before staff processes the application and/or incentive payment. Incentives provided through the Energy Efficiency grant award are only available for qualifying residents in the Energy Resiliency

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Communities (ERCs) and who are Pepco and/or Washington Gas customers (with properties built prior to March 23rd, 2016).

By signing this application, the grant awardee certifies that the information provided in the application and all of its attachments is complete, accurate, and true. The signatory further certifies that they are authorized to submit this application on behalf of the house owner and to agree to the terms and conditions stated below:

1. Grant awards Terms & Conditions are subject to change.
2. Grant awards are designed to cover some portion of the net customer cost after other incentives and grants have been applied.
3. The house meets the eligibility criteria as stated by the County and on the application and the owner will make reasonable effort to ensure all measures approved for a grant award shall stay in the County within the facility in which they were installed.
4. Grant awardees agree to have a whole-house energy evaluation performed on their home and will provide to the County a copy of their evaluation report and related documents or allow the County to obtain this information directly from the evaluation firm.
5. Grant awardees agree to allow Pepco, Washington Gas, and Maryland Department of Housing and Community Development (DHCD)'s respective EmPOWER Maryland programs to discuss and share information with the County to facilitate the grant awardee's application and request for an incentive.
6. Prince George's County or its representative(s) may use photos and video of the property and relevant data presented for marketing, publicity, and advertising purposes. Prince George's County and/or its representatives, subject to the requirements of the Maryland Public Information Act and other applicable laws, will not divulge any confidential information, or trade secrets. In addition, the County may request that grant awardees provide oral or written feedback regarding their participation in the grant award.
7. The County may, with permission of the grant awardee, access the house in order to conduct site visits and measurement and verification of activities. Final payment may be subject to a satisfactory site visit and is subject to grant awardee verification of the completion of work.
8. The County, program sponsors, and their officials, agents, servants, employees and/or authorized representatives (collectively, the "Indemnitees"), provide no guarantee nor shall they be responsible for:
 - a. Any representations, advice, or other information or opinions provided by a financial institution, home energy evaluator, home improvement contractor, or other third party, nor for the quality, scope, or efficacy of work, information, or opinions provided by such third parties;
 - b. Any financial institution's, evaluator's, improvement contractor's, or other third party's work or services;

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- c. Any reduction in energy bills, improvement in comfort, safety, or value of grant awardee's home, or the achievement of any other results sought by grant awardee as a result of the evaluation or the improvements (if any); or
 - d. The accuracy or efficacy of information and resources generated by others, notwithstanding that such information or resources may be provided and/or evaluated by any of the Indemnitees.
- 9. The grant awardee and selected contractor shall comply with, apply for and obtain all necessary permits from applicable regulatory agencies including federal, state, and local jurisdictions and local utilities.
- 10. The grant awardee shall release, indemnify, forever discharge, and hold harmless the Indemnitees from and against all suits, actions, damages, and costs of every kind and description, including attorneys' fees, arising directly or indirectly, in whole or in part, out of:
 - a. The negligent or other acts or omissions of third parties, including financial institutions;
 - b. Any provision or evaluation by any of the Indemnitees of information and resources provided by such third parties.

HOLISTIC TIMELINE FOR PROJECT COMPLETION

- ✓ Upon receiving the completed prequalification requirements and after successfully reviewing required documents, the County staff will send a notice of prequalification that reserves funds for the project within 15 days.
- ✓ Grant awardees will have two weeks to accept the grant award after receiving a notice of prequalification.
- ✓ Work should be completed and an invoice submitted within 90 days of receiving prequalification approval notification. Applicants may request a onetime extension; the total time-period the grant can remain valid, including any extensions, shall not exceed six (6) months. The County is not required to grant an extension.
- ✓ Final approval of application and satisfactory site visit will occur within 10 business days of receipt of final invoice. Final payment is subject to a satisfactory site visit and grant awardee verification of the completion of work.
- ✓ Upon submitting request for payment, the Office of Finance will approve invoices within 30 business days.

PARTICIPANT CERTIFICATION

I hereby certify that I have read, understood, and agree to abide by the County's Terms and Conditions. I understand that failure to abide by these terms and conditions may lead to withholding or suspending, in whole or in part, funds provided under this grant award, or recovering unspent or misspent funds through the placement of a lien on the my real and/or personal property to secure repayment.

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By signing this application, the applicant certifies under penalty of perjury that the information provided in the application and all of its attachments is complete, accurate, and true. The signatory further certifies that they are authorized to submit this application on behalf of the property, and, to agree to the terms and conditions.

This application is for (please select one of the options below):

- ☐ Electric Incentives
☐ Electric AND Natural Gas Incentives

Part A. AUTHORIZED APPLICANT

For Electric Incentives	
Authorized Applicant:	
Contractor/Vendor:	
Date:	
Organization Name:	
Title:	
Name:	
Authorized Signature: Contractor/Vendor Signature*:	
For Gas Incentives	
Authorized Applicant:	
Contractor/Vendor:	
Date:	
Organization Name:	
Title:	
Name:	
Authorized Signature: Contractor/Vendor Signature*:	
<i>* If the contractor/vendor completed the application.</i>	

Part B. PAYMENT INFORMATION

PAYMENT INFORMATION (For Electric Incentives)
<i>If the contractor or trade ally completing the work or another 3rd party will be receiving the incentive directly, the customer must authorize payment by signing below.</i>
Payment to: <input type="checkbox"/> Contractor/Trade Ally <input type="checkbox"/> Other 3rd Party Customer
Signature: _____

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Contractor Name: _____
Date: _____
PAYMENT INFORMATION (For Gas Incentives)
<i>If the contractor or trade ally completing the work or another 3rd party will be receiving the incentive directly, the customer must authorize payment by signing below.</i>
Payment to: <input type="checkbox"/> Contractor/Trade Ally <input type="checkbox"/> Other 3rd Party Customer
Signature: _____
Contractor Name: _____
Date: _____

E. APPLICANT INFORMATION

Applicant:			SSN/Tax I.D.	
Co-Applicant:			SSN/Tax I.D.	
Street Address:				
City/State:		Zip Code:		Year Built:
Daytime Phone:		Gross Square Footage:		
Email address:				

F. DETAILED INCENTIVE INFORMATION

List and attach the applications, grant award letters and/or other documentation related to other incentives applied to the project. Attach additional sheets if necessary.			
<u>INCENTIVE PROGRAM</u>	<u>ISSUING ORGANIZATION</u>	<u>PURPOSE</u>	<u>INCENTIVE AMOUNT</u>

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List the measures and cost(s) you are seeking a grant award. The list should be supported by the home energy assessment report. Please be sure to include AHRI/model #s on the Scope of Work for requested equipment.

<u>ENERGY EFFICIENCY MEASURE (Electric)</u>	<u>AMOUNT REQUESTED</u>
<u>ENERGY EFFICIENCY MEASURE (Natural Gas)</u>	<u>AMOUNT REQUESTED</u>
<u>HEALTH AND SAFETY MEASURE</u>	<u>AMOUNT REQUESTED</u>

Applications may be emailed, hand-delivered, or mailed to:

Prince George's County, Office of Central Services, Sustainable Energy
1400 McCormick Drive, Suite 281 Largo, MD 20774
Email: CleanE@co.pg.md.us

For more information, call: 301-883-6450 or visit MyPGC.us/SustainableEnergy

[Click here to download the W9 form](#)

COVID19 Participation Terms and Conditions

Office of Central Services, Sustainable Energy

Clean Energy Program

I. TERMS AND CONDITIONS		READ CAREFULLY AND SIGN	
<p>APPLICATION: The Clean Energy Grant Application, and all supporting documents, including this Terms and Conditions must be signed by the Contractor and Applicant to be valid.</p> <p>GRANT AWARD AMOUNT & AUDIT FEES: The Clean Energy grant offers up to \$7,500 in funds for residential energy efficiency measures, in addition to Pepco and Washington Gas incentives. The maximum grant award amount is \$7,500 (for gas and electric incentives), of which \$5,000 can be allocated towards electric incentives and \$2,500 toward natural gas incentives, and up to 50% of total grant award amount (\$3,750) can be allocated towards air sealing and insulation (does not include ancillary equipment like baffles/ventilation). OCS Sustainable Energy (OCS SE) will provide up to \$100 (amount included in total \$7,500) for the cost of the home energy assessment. The applicant is eligible to receive direct installs at no cost from his/her contractor as part of the audit. Talk to your contractor about your needs for direct installs during the audit.</p> <p>For Solar PV Application:</p> <p>A. If system is owned by the homeowner:</p> <ul style="list-style-type: none">✓ Grant awards up to \$10,000 to cover eligible costs associated with installing a solar photovoltaic system.✓ Grant awards up to \$2,000 to purchase and install a solar power outlet in case of grid failure. <p>B. For third-party owned systems:</p> <ul style="list-style-type: none">✓ Grant awards up to \$2,000 to cover eligible costs associated with installing a solar photovoltaic system.✓ Grant awards up to \$2,000 to purchase and install a solar power outlet in case of grid failure.		<p>For Solar Water Heater Application:</p> <p>A. If system is owned by the homeowner:</p> <ul style="list-style-type: none">✓ Grant awards up to \$7,500 to cover eligible costs associated with installing a solar water heater. <p>B. For third-party owned systems:</p> <ul style="list-style-type: none">✓ Grant awards up to \$2,000 to cover eligible costs associated with installing a solar water heater. <p>ELIGIBILITY: The grant awards are valid for Pepco and/or Washington Gas customers living in a single-family, townhouse residence, or condominium that is individually metered (built before March 23, 2016), in one of the following designated Energy Resiliency Communities (ERC): Bladensburg - East Riverdale; Forestville; Hillcrest Heights - Marlow Heights; Kentland - Palmer Park; Oxon Hill – Glassmanor; Silver Hill; Suitland - Coral Hills; Langley Park; and Woodlawn – West Lanham. To confirm you are in one of the ERC communities, you must look up your address ensure it is within the boundary by using the ERC Address Locator. The ERC Address Locator is the definitive tool for determining the eligibility of an application.</p> <p>ENDORSEMENT & WARRANTY: OCS SE does not endorse, sponsor, or otherwise make any representation or warranty with respect to any contractor or the work, materials, or services provided by any contractor.</p> <p>APPROVAL, VERIFICATION & INSPECTION: Grant funds will be reserved upon review and approval of the application. OCS SE reserves the right to inspect and verify that all components in the work scope have been implemented in accordance with federal, state and county laws.</p>	
<p>HEALTH AND SAFETY: Any health and safety issues identified during the audit must be resolved prior to an application being pre-approved by OCS SE.</p>			
<p>CORONAVIRUS/COVID-19 LIABILITY AND INDEMNIFICATION: Applicant and Contractor each acknowledges the contagious nature of the Coronavirus/COVID-19 and that the CDC and many other public health authorities still recommend practicing social distancing. Applicant and Contractor each further acknowledges that Prince George’s County has put in place preventive measures to reduce the spread of the Coronavirus/COVID-19. Applicant further acknowledges that his/her selected contractor and OCS SE cannot guarantee he/she will not be infected with the Coronavirus/COVID-19. Contractor further acknowledges that OCS SE cannot guarantee he/she will not be infected with the Coronavirus/COVID-19.</p>			

Applicant understands the risk of becoming exposed to and/or infected by the Coronavirus/COVID-19 may result from the actions, omissions, or negligence of him/herself and others, including, but not limited to, the selected contractor staff, and other clients and families of the selected contractor.

Applicant agrees to voluntarily seek services provided by the selected contractor and acknowledge that he/she is increasing his/her risk to exposure to the Coronavirus/COVID-19.

Applicant and Contractor hereby release and agree to hold Prince George's County, its officials, employees and agents harmless from, and waive on behalf of him/herself, his/her heirs, and any personal representatives, any and all causes of action, claims, demands, damages, costs, expenses and compensation for damage or loss to him/herself and/or property that may be caused by any act, or failure to act by Applicant, the selected contractor, or that may otherwise arise in any way in connection with the audit and any services received from the selected contractor or provided to Applicant.

Applicant and Contractor understand that this release discharges Prince George's County, its officials, employees and agents from any liability or claim that it, he/she, his/her heirs, or any personal representatives may have against Prince George's County, its officials, employees and agents with respect to any bodily injury, illness, including COVID-19, death, medical treatment, or property damage that may arise from, or in connection to, the audit and any services received from the selected contractor or provided to the Applicant. This liability waiver and release extends to all owners, partners, and employees of the selected contractor and of the Applicant.

II. APPLICANT AND CONTRACTOR INFORMATION AND SIGNATURES

APPLICANT	CONTRACTOR
<input type="checkbox"/> By signing this form, I agree to all of the Terms and Conditions in this agreement	<input type="checkbox"/> By signing this form, I agree to all of the Terms and Conditions in this agreement
Customer Signature:	Contractor Signature:
Print Name:	Print Name:
Date:	Date:
Email:	Contractor's Name:
Pepco Account Number:	
Washington Gas Account Number:	

For questions about the grant application process and procedures, call our Office at 301 803 6450 or email CleanE@co.pg.md.us.

PRINCE GEORGE'S COUNTY GOVERNMENT
Office of Central Services
Sustainable Energy

Energy Resiliency Community Clean Energy Grant

AFFIDAVIT OF INCOME
For the Energy Efficiency Grant

Any information you provide will be kept completely confidential. Please note the funding source for this grant requires we spend a certain portion of the funds with low and moderate income residents. Consequently, we are unable to determine compliance with this requirement without asking for income information.

Applicant's Name: _____

Full Address: _____

City, State, Zip: _____

Phone Number: (Primary) _____ (Secondary) _____ (Other) _____

Email Address: _____

I certify that there are [] persons living in the house and my/our annual gross income is \$_____.

I solemnly declare, under oath, and subject to the penalties of perjury, declare that the above information is true and correct to the best of my knowledge, information, and belief.

Signature of Affiant

Date

* Signature of Witness to the Affidavit

Date

Printed Name of Affiant

Date

* Printed Name of Witness to the Affidavit

Date

*The *Witness to the Affidavit* is a person witnessing the completion of this document, and need not be a notary public. For example, the contractor performing the energy retrofit service may sign as a witness.

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ► _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
	6 City, state, and ZIP code	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-				-	
or									
Employer identification number									
				-					

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); 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 or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ►	Date ►
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5 ²
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983.

You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor*
For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

***Note:** The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Visit www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.