

The Trade Ally Reward program offers incentives to Trade Allies who demonstrate superior customer service by completing and submitting error-free paperwork on behalf of their customers. Trade Allies may be eligible for a reward of up to 20 percent of the customer's incentive amount for Commercial & Industrial and Agribusiness program applications through the Energy Optimization program, up to \$400 per application.

## Eligibility Requirements

- **TRADE ALLIES MUST BE ENROLLED WITH THE ENERGY OPTIMIZATION PROGRAM** in order to be eligible for the reward. Please visit [michigan-energy.org](http://michigan-energy.org) or call **877.296.4319** for a Trade Ally enrollment form.
- This reward is associated only with Energy Optimization Commercial & Industrial and Agribusiness program applications of participating utilities. See the Terms and Conditions at the bottom of Page 2 of this application for a list of participating utilities.
- Trade Ally rewards are available for qualifying projects for which an incentive application is **submitted** between January 1, 2019 and December 31, 2019. The Trade Ally Reward Application must be submitted within 30 days of submission of customer's incentive application.
- The customer's incentive application form must be submitted to the Energy Optimization program by the Trade Ally who is requesting the reward. The application must be submitted directly by one of the three methods listed in Step 3 below. **DO NOT** submit the application to the program's field outreach manager.
- Approval of this reward application is subject to approval of the customer's incentive application. The corresponding customer's incentive application must contain **ALL** required information at the time of submission. Missing information may result in denial of the Trade Ally reward. Commonly missed items include:
  - Customer's electric utility account number.
  - Project completion date.
  - Missing or inaccurate payee tax information and signature.
  - Customer signature.
  - Equipment type(s), make, model number, and quantity supported by detailed invoice and spec sheets.See Sample Invoice at [michigan-energy.org](http://michigan-energy.org).
- Only one Trade Ally reward will be allowed per customer incentive application.
- Splitting a single project into multiple incentive applications in an attempt to get a larger reward is not permitted.

## How to Apply for the Trade Ally Reward

### Step 1

**Complete an incentive application** through the Energy Optimization Commercial & Industrial or Agribusiness program on your customer's behalf.

- Have your customer fill out their contact information and tax information (if applicable) on Page 2 of the customer incentive application form. Your customer's signature (NOT the signature of the Trade Ally) must appear at the bottom of Page 2 of the incentive application.
- Fill out the remainder of the application form, including equipment quantity and model number, as appropriate. Attach all required supporting documentation, such as itemized invoice, spec sheets, etc. You must also submit the incentive application for your customer when you submit the Trade Ally Reward Application.

### Step 2

**Fill out the Trade Ally Reward Application.**

- Note that the Trade Ally submitting an application for the reward may be different than the contractor that appears in Section 3 of the customer's incentive application form. If your company was the installing contractor for the project, simply write "See Trade Ally Reward Application" in Section 3 of the customer incentive application form.
- If you will be submitting a Trade Ally Reward Application for multiple projects, after completing Sections 1 through 4 and signing the Reward Application, you may fill in just Sections 3 and 4 for additional applications.

### Step 3

**Submit** your customer's incentive application AND your Trade Ally Reward Application together to:

**Mail:** MECA EO Programs, 431 Charmany Drive, Madison, WI 53719

**Email:** [info@michigan-energy.org](mailto:info@michigan-energy.org)

**Fax:** 608.646.7682



# 2019 Commercial & Industrial and Agribusiness Programs Trade Ally Reward Application

## SECTION 1: Customer Application Information

Customer Name:	Job Site Name (if different than customer name):		
Job Site Address:	City:	State: <b>MI</b>	ZIP:

## SECTION 2: Trade Ally Reward Calculation

A. Customer Incentive Amount \$	B. Customer Incentive Amount (A) x 20% \$	C. Maximum Trade Ally Reward \$400	<b>D. Total Trade Ally Reward (lesser of B or C)</b> \$
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Trade Ally Rewards are limited to a total of \$5,000 per Trade Ally per calendar year.

## SECTION 3: Trade Ally Information (if same as Section 3 on customer incentive application form, you may write "See TA reward application" in this section)

Trade Ally Business Name:	Contact Name:	Contact Phone:	Contact Email:
Mailing Address:	City:	State:	ZIP:

## SECTION 4: Trade Ally Reward Payment Information (as it appears on IRS form W-9)

Rewards are payable to the installing contractor, equipment distributor, or other vendor who helps the customer through the incentive application process and submits the application on their behalf. Reward check will be sent to the Trade Ally mailing address entered immediately above.			
Payee Legal Name (as shown on income tax return):		Payee Business Name (if different than payee legal name):	
Payee Legal Address:	City:	State	ZIP:
Check appropriate box for federal tax classification (check only <b>one</b> of the following seven boxes): <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC – Enter the tax classification (C = C corporation, S = S corporation, P = partnership) _____ <b>Note:</b> For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input type="checkbox"/> Other tax exempt organization or government agency			
Payee Taxpayer Identification Number (TIN) (Complete <b>ONE</b> only. Must match payee legal name above.) FEIN #: _____ - _____ - _____ <b>OR</b> SSN: _____ - _____ - _____			
<b>Certification: the following certifications are required in order for this form to substitute for the IRS form W-9.</b> Under penalties of perjury, I certify that: 1. The payee's TIN is correct. 2. The payee is not subject to backup withholding due to failure to report interest and dividend income. 3. The payee is a U.S. citizen. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.		<b>Incentive Certification</b> This Trade Ally Reward Application cannot be processed unless all of the appropriate fields on this application are complete. I have read and understand the terms and conditions. I certify that the information I have provided is true and correct and the product(s) and/or equipment for which I am requesting an incentive meets the requirements in this application. I have elected to utilize electronic signatures. I understand and intend that a legal signature is formed by typing my name on this document. If any of the parties do not wish to sign this document electronically, all must opt out together and print a paper copy to sign manually.	
Payee Signature: /S/	Print Name:	Title:	Date:

## Terms and Conditions

- Trade Ally rewards are available for error-free customer incentive applications **submitted** between January 1, 2019 and December 31, 2019. Approval of this reward application is subject to approval of the customer's incentive application. The Trade Ally agrees to the Terms and Conditions of that application. See michigan-energy.org for the appropriate incentive application form.
- The Trade Ally reward is available in the following participating utilities' electric service territories: Great Lakes Energy Cooperative, Midwest Energy & Communications, HomeWorks Tri-County Electric Cooperative, Presque Isle Electric & Gas Cooperative, and City of South Haven.
- Funds for the Trade Ally reward are limited and available on a first-come, first-served basis, and only after your customer's incentive application is approved and processed. Trade Ally rewards are limited to a total of \$5,000 per Trade Ally per calendar year. The reward is subject to change, amendment, or cancellation at any time without notice. Only one Trade Ally reward will be allowed per customer incentive application.
- Neither the Energy Optimization program nor the electric utility will be responsible for any taxes that may be imposed on your business as a result of the payment of rewards. You are urged to consult your tax advisor concerning your tax liability.
- The Energy Optimization program administrator will resolve all issues of reward eligibility. The applicant agrees that all decisions of the Energy Optimization program or collaborative utilities are final and the applicant will abide by those decisions. The Energy Optimization program administrator reserves the right to terminate eligibility for the Trade Ally reward at any time without notice.