

Nonprofit Loan Application

All sections must be completed in order to process application.



www.mncee.org

Email: loaninfo@mncee.org

Ph (612) 335-5884 Fax (612) 335-2650

ENERGY PROJECT INFORMATION

Project cost (\$ _____ for Equipment, \$ _____ for Labor)	\$ _____	Energy Savings Payback
Amount of Xcel Energy rebate, if any (subtract this amount)	\$ _____	
Net Project Cost	\$ _____	
Loan origination fee* (*Mortgage, flood and title fees may apply.)	\$ _____	
Loan amount requested	\$ _____	

APPLICANT INFORMATION

Legal business name			Tax ID or Social Security number		
Street address			Xcel Energy account number		
City	State	Zip	Telephone number		
Contact person			Title		
Email address			Fax number		
Web address			Number of years in business		
Last year's fiscal gross revenue		Last year's fiscal net profit		Net worth	

TYPE OF BUSINESS	<input type="checkbox"/> PARTNERSHIP	<input type="checkbox"/> CORPORATION	<input type="checkbox"/> OTHER
	<input type="checkbox"/> General	<input type="checkbox"/> S Corporation	<input type="checkbox"/> Sole proprietorship (DBA _____)
	<input type="checkbox"/> Limited liability partnership	<input type="checkbox"/> C Corporation	<input type="checkbox"/> Limited liability Company
	<input type="checkbox"/> 501(c)(3) Nonprofit Corporation	<input type="checkbox"/> Government entity	
State of Incorporation or Organization:: _____		Date Incorporated or Organized:: _____	

TYPE OF PROPERTY

<input type="checkbox"/> Office	<input type="checkbox"/> Big Box Retail / Grocery	<input type="checkbox"/> Healthcare Office / Out-Patient	<input type="checkbox"/> Manufacturing
<input type="checkbox"/> Restaurant	<input type="checkbox"/> Elementary / Secondary School	<input type="checkbox"/> Hospital / Medical Clinic	<input type="checkbox"/> Warehouse
<input type="checkbox"/> Retail	<input type="checkbox"/> College / University	<input type="checkbox"/> Hotel / Motel	<input type="checkbox"/> Assembly / Religious
<input type="checkbox"/> Multi-Family	<input type="checkbox"/> 1 - 4 Family Rental	<input type="checkbox"/> Long-term care	<input type="checkbox"/> Other/Misc. _____
Building floor area _____ SqFt		Portion Occupied by Nonprofit _____%	
Age of building _____ Years			

EQUIPMENT INFORMATION (Attach copy of vendor's proposal/contract)

(1) Vendor name	Contact person	Equipment cost
Telephone number	Fax number	
(2) Vendor name	Contact person	Equipment cost
Telephone number	Fax number	

Description of equipment and efficiency, if applicable (attach copy of bids or estimates)	<p>Official Use Only</p> <p>0% Interest Rate Energy Savings Fund for Nonprofits</p> <p>Funded By Center for Energy and Environment</p>
Address of real estate where equipment will be located. (Use attachment if needed.)	
County _____	
Name, address and phone number of record owner of real estate where equipment will be located (if different than applicant). <input type="checkbox"/> Check here if same as applicant	

TRADE REFERENCES

Vendor Name 1	Contact Person	Phone Number
Vendor Name 2	Contact Person	Phone Number

SIGNATURE AND AUTHORIZATION FOR DISCLOSURE OF BUSINESS CREDIT INFORMATION

By signing below, I acknowledge and attest that the Applicant is a valid business entity and that I am authorized to make this application and the authorizations and agreements below on the Applicant's behalf, and that all information contained in and submitted with this application is true, correct and complete.

I further authorize and consent to the release of information to Center for Energy and Environment ("CEE") from any source, including without limitation credit reporting agencies and the personal, bank, and trade references listed above, that may be requested by CEE in connection with this application, and the sharing of such information by CEE with third parties for purposes of this application. The Applicant hereby agrees to release and hold CEE and its employees, managers, and directors harmless from, and indemnify them against, any claims or liabilities whatsoever arising out of or related to CEE's procurement or sharing of such information for such purposes.

A photocopy or facsimile copy of this authorization bearing the signatures of the undersigned is valid as an original.

X _____ (Authorized signature of applicant) _____ (Title) _____ (Date)

X _____ (Print or type name of authorized agent)

Notice:

The federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applicants on the basis of race, color, religion, national origin, sex, marital status, age (provided the applicant has the capacity to enter into a binding contract); because all or part of the applicant's income derives from any public assistance program; or because the applicant has in good faith exercised any right under the Consumer Credit Protection Act. The federal agency that administers compliance with this law concerning this creditor is the Federal Trade Commission, Equal Credit Opportunity, Washington, DC 20580. If your application for business credit is denied, you have the right to a written statement of the specific reasons for the denial. To obtain the statement, please call or send a written request within 60 days of the date you are notified of the decision to: Center for Energy and Environment, 212 3rd Avenue North, Suite 560, Minneapolis, MN 55401; Tel: (612) 335-5884. We will send you a written statement of reasons for the denial within 30 days of receiving your request for the statement.

Information Required

- Loan application
- Financial statements
- Vendor's Proposal/Contract
- Copy of IRS tax exemption letter.
- Lien Waiver for entire cost of work
- Copy of applicable permits pulled for work

Plus For Nonprofit Loan

- Copy of annual nonprofit status filing with the Minnesota Secretary of State and/or your most recent 2 years of IRS 990 forms.
- Written approval from the Board of Directors approving the proposed work and identifying the person with signing authority.
- Written consent from property owner for tenant to do work on the property (if owner is not grant applicant).
- If your project is going through a utility Custom Efficiency program, you should attach a copy of the Custom Efficiency pre-approval letter.
- Signed data release forms for Gas (i.e., CenterPoint Energy or other) and Electric (i.e., Xcel Energy or other) utilities.

Return completed application to:

Center for Energy and Environment
 212 3rd Avenue North, Suite 560
 Minneapolis, MN 55401
 Attn: Lending Center
 loaninfo@mncee.org, Ph (612) 335-5884

ENERGY PROJECT ELIGIBILITY

- Retrofit energy efficiency and energy conservation projects in existing buildings (no new construction).
- Energy efficiency projects that qualify include: lighting, retro-commissioning, HVAC equipment/controls, motors, insulation, etc.,
- Energy efficiency projects must have a simple payback of less than 10 years, calculated before the CEE Nonprofit Grant,
- Energy project documentation requirements include: existing conditions and energy use; proposed project description; new conditions and energy use; estimates of energy savings; estimates of energy cost savings; simple economic payback; utility rebate applications; detailed contractor invoice with itemized equipment and labor; and other supporting documents as needed.
- Nonprofit or building owner must provide: access to all energy utility bills for 12 months prior and 12 months after the energy retrofit; building access to verify the operation of the energy project; and authorization for public reporting of energy projects.
- Renewable energy (PV, solar thermal, wind, etc.) and fuel switching (natural gas to electric, etc.) projects are not qualified.
- CEE reserves the right to reject any projects at it's discretion.

CEE iFACET, Business Loan Form # 170505

AUTHORIZATION FOR ONE-TIME RELEASE OF INFORMATION
(OTHER THAN CUSTOMER ENERGY USAGE DATA)

(1) INFORMATION TO BE RELEASED

The customer requests release of his/her information for the following purpose(s):

- Credit reference (release includes customer name, mailing address, Xcel Energy account number, service address and service dates, service type/s, and credit history details with Xcel Energy)
- Service verification (release includes customer name, mailing address, Xcel Energy account number, service address and dates, and service type/s)
- Lock authorization (release includes property owner name and mailing address, Xcel Energy account number, service address, service type/s, and meter number/s)
- Other (specify):

Exclusion: In no case will this form be used to have Xcel Energy release the customer's Social Security Number or any financial account number to a third party.

(2) THIRD PARTY RECIPIENT INFORMATION:

Recipient's name: CEE Lending Center

Physical/mailling address: 212 3rd Avenue North, Suite 560, Minneapolis, MN 55401

Phone: (612) 335-5884 Fax: (612-335-2650)

Email: loaninfo@mncee.org

CUSTOMER'S CONSENT

Your information is treated as private by Xcel Energy. You are not required to authorize the disclosure of your information to a third party, and your decision not to authorize the disclosure will not affect your utility services. Note that Xcel Energy will have no control over the information disclosed pursuant to this consent, and will not be responsible for monitoring or taking any steps to ensure that the recipient maintains the confidentiality of the information or uses it as authorized by you.

By signing this form you acknowledge and agree that you are the customer of record for this account and that you authorize Xcel Energy to disclose your information as specified in this form.

Until Xcel Energy fulfills your authorized release, you may withdraw consent for release by sending a written request with your name and service address to Xcel Energy at P.O Box 8 Eau Claire WI 54702 or datarequest@xcelenergy.com.

CUSTOMER ACCOUNT NUMBER

SERVICE ADDRESS

SIGNATURE OF CUSTOMER OF RECORD

PRINTED NAME

DATE SIGNED

