



## Alternative Energy Revolving Loan Program (AERLP)

### Business Application Form

**How did you hear about this loan program? Check all that apply.**

- ☐ Installer/Supplier ☐ DEQ Website ☐ DSIRE Website ☐ Home/Farm Show ☐ MT Clean Energy Fair  
☐ USDA Workshop ☐ Newspaper/Radio Ad ☐ Online Ad ☐ Family/Friend ☐ Other:

## PART 1: BUSINESS INFORMATION

### 1a. Business Profile

Legal name of business		DBA	
Mailing address		City	State Zip
Street address <input type="checkbox"/> Same as mailing address		City	State Zip
Tax Identification Number	Phone number	Fax number	Website
Authorized business representative	Title	Phone number	Email address
Type of business entity <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> General Partnership <input type="checkbox"/> S Corporation <input type="checkbox"/> Corporation <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Limited Partnership <input type="checkbox"/> Limited Liability Partnership <input type="checkbox"/> Nonprofit <input type="checkbox"/> Other:			
Description of business			
Net annual sales/revenue \$	Gross profit \$	Net operating profit \$	Net profit/loss \$
Number of employees	Date business established	Years in current ownership	Number of locations
Has this business previously received an AERLP loan? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what year was loan received?			
Do any owners of the business have a lock on their credit? *			<input type="checkbox"/> Yes <input type="checkbox"/> No
Has the business or person with an equity interest in the business ever declared bankruptcy? **			<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the business or any owner a party to any lien or lawsuit? **			<input type="checkbox"/> Yes <input type="checkbox"/> No
Are there any delinquent payroll, income or property taxes owed by the business? **			<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the business for sale or under agreement that would change the persons who hold an equity interest in the business? **			<input type="checkbox"/> Yes <input type="checkbox"/> No
Has the business name changed in the last 5 years? **			<input type="checkbox"/> Yes <input type="checkbox"/> No

\*Running a credit check is part of the financial review. As a protection against unauthorized credit access individuals may choose to lock their credit so it cannot be accessed without authorization.

\*\*If the answer to any of these questions is "yes", please provide details in Part 8 of this application.

### 1b. Business Debt Schedule

Creditor	Date opened	Opening balance	Current balance	Interest rate	Monthly payment	Maturity date	Collateral
		\$	\$		\$		
		\$	\$		\$		
		\$	\$		\$		
		<b>Total:</b>	<b>\$</b>	<b>Total:</b>	<b>\$</b>		

## PART 2: BUSINESS OWNER INFORMATION (OWNER #1)

Please complete for all persons with **greater than 20%** equity interest in the business. If necessary, use additional copies of this part.

### 2a. Owner Information

First name	M.I.	Last name
Title	% Ownership	Social Security Number
Home address	City	State Zip
Primary phone number	Secondary Phone Number	Email address (Required)

### 2b. Owner Annual Income

Category	Annual income
Employer:	\$
Investment income	\$
Real estate income	\$
Other:	\$
<b>Total annual income</b>	<b>\$</b>

### 2c. Owner Assets

Description	Value
1. Real estate, list address:	\$
2. Real estate, list address:	\$
3. Vehicle, list year/make/model:	\$
4. Vehicle, list year/make/model:	\$
5. Cash, list bank name:	\$
6. Stocks/bonds/Pension/401K (list total value)	\$
7. Life insurance, list company:	\$
8. Other, describe:	\$
<b>Total assets</b>	<b>\$</b>

### 2d. Owner Liabilities

Description	Monthly Payment	Balance
1. Mortgage, list lender:	\$	\$
2. Mortgage, list lender:	\$	\$
3. Vehicle loan, list lender:	\$	\$
4. Vehicle loan, list lender:	\$	\$
5. Bank loan, list lender:	\$	\$
6. Credit card debt, list bank:	\$	\$
7. Credit card debt, list bank:	\$	\$
8. Other, describe:	\$	\$
<b>Total liabilities</b>	<b>\$</b>	<b>\$</b>

## PART 2: BUSINESS OWNER INFORMATION (OWNER #2)

Please complete for all persons with **greater than 20%** equity interest in the business. If necessary, use additional copies of this part.

### 2a. Owner Information

First name	M.I.	Last name
Title	% Ownership	Social Security Number
Home address	City	State Zip
Primary phone number	Secondary phone number	Email address (Required)

### 2b. Owner Annual Income

Category	Annual income
Employer:	\$
Investment income	\$
Real estate income	\$
Other:	\$
<b>Total annual income</b>	<b>\$</b>

### 2c. Owner Assets

Description	Value
1. Real estate, list address:	\$
2. Real estate, list address:	\$
3. Vehicle, list year/make/model:	\$
4. Vehicle, list year/make/model:	\$
5. Cash, list bank name:	\$
6. Stocks/bonds/Pension/401K (list total value)	\$
7. Life insurance, list company:	\$
8. Other, describe:	\$
<b>Total assets</b>	<b>\$</b>

### 2d. Owner Liabilities

Description	Monthly Payment	Balance
1. Mortgage, list lender:	\$	\$
2. Mortgage, list lender:	\$	\$
3. Vehicle loan, list lender:	\$	\$
4. Vehicle loan, list lender:	\$	\$
5. Bank loan, list lender:	\$	\$
6. Credit card debt, list bank:	\$	\$
7. Credit card debt, list bank:	\$	\$
8. Other, describe:	\$	\$
<b>Total liabilities</b>	<b>\$</b>	<b>\$</b>

## PART 2: BUSINESS OWNER INFORMATION (OWNER #3)

Please complete for all persons with **greater than 20%** equity interest in the business. If necessary, use additional copies of this part.

### 2a. Owner Information

First name	M.I.	Last name
Title	% Ownership	Social Security Number
Home address	City	State Zip
Primary phone number	Secondary phone number	Email address (Required)

### 2b. Owner Annual Income

Category	Annual income
Employer:	\$
Investment income	\$
Real estate income	\$
Other:	\$
<b>Total annual income</b>	<b>\$</b>

### 2c. Owner Assets

Description	Value
1. Real estate, list address:	\$
2. Real estate, list address:	\$
3. Vehicle, list year/make/model:	\$
4. Vehicle, list year/make/model:	\$
5. Cash, list bank name:	\$
6. Stocks/bonds/Pension/401K (list total value)	\$
7. Life insurance, list company:	\$
8. Other, describe:	\$
<b>Total assets</b>	<b>\$</b>

### 2d. Owner Liabilities

Description	Monthly Payment	Balance
1. Mortgage, list lender:	\$	\$
2. Mortgage, list lender:	\$	\$
3. Vehicle loan, list lender:	\$	\$
4. Vehicle loan, list lender:	\$	\$
5. Bank loan, list lender:	\$	\$
6. Credit card debt, list bank:	\$	\$
7. Credit card debt, list bank:	\$	\$
8. Other, describe:	\$	\$
<b>Total liabilities</b>	<b>\$</b>	<b>\$</b>

## PART 3: PROJECT INFORMATION

### 3a. Project Location and Site Review

Street address <input type="checkbox"/> Same as applicant address	City	State	Zip
		MT	
County	Reservation	<input type="checkbox"/> N/A	
Do you own or lease the property where project is located?	Year structure(s) built where project is located		
<input type="checkbox"/> Own <input type="checkbox"/> Lease*	<input type="checkbox"/> New construction		
Are any of the structures on the property listed in the National or State Register of Historic Places or Districts?	Will any known threatened or endangered species or critical habitat be affected by project?		
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Will there be any excavation, trenching, or land disturbance associated with the project?	Will any water bodies be affected by the project?		
<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, estimate disturbed area (square feet):	<input type="checkbox"/> Yes <input type="checkbox"/> No		
To your knowledge, has this project generated public concern or controversy?			
<input type="checkbox"/> Yes <input type="checkbox"/> No			

\*If applicant leases the property, please include a letter from owner granting permission for the project to proceed.

### 3b. Alternative Energy System Information

Check and complete sections for **all** technologies that will be included in loan request. Include additional sheets if necessary. Installer or supplier may be able to assist with technical information and projected cost savings.

☐ Solar photovoltaic (PV) or ☐ Wind

Generating capacity (kW)	Projected energy production in first year of operation (kWh)	
Current annual energy usage (kWh)	Projected energy cost savings in first year of operation	
	\$	
Percentage of offset (production divided by usage)	If offset is over 110%, please provide explanation of oversized system (Use Part 10, if needed):	
Will system be connected to the grid?	Does the system include batteries? <input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/> Yes <input type="checkbox"/> No <b>If yes, to what utility?</b>	If yes, list battery capacity:	
Mounting system (solar only)	Tower height, feet (wind only)	
<input type="checkbox"/> Rooftop <input type="checkbox"/> Ground <input type="checkbox"/> N/A	<input type="checkbox"/> N/A	
Expected installation completion date	Expected life of system (years)	Total installed system cost
		\$
Installer/supplier business name	Installer/supplier contact name	Installer/supplier email
Additional notes		

☐ Biomass combustion device/Wood stove/Pellet stove

Heating capacity (BTU/hr.)	Rated efficiency (%)	Projected amount of fuel burned annually
		<input type="checkbox"/> Cords <input type="checkbox"/> Pounds
Fuel source	Projected energy cost savings in first year of operation	
<input type="checkbox"/> Cord wood <input type="checkbox"/> Pellets <input type="checkbox"/> Other:	\$	
Expected installation completion date	Expected life of system (years)	Total installed system cost
		\$

Installer/supplier business name	Installer/supplier contact name	Installer/supplier email
Additional notes		

☐ Solar thermal/Solar hot water

Total collector surface area (sq. ft.)	Projected energy production in first year of operation (MMBTU)	
Type of collectors <input type="checkbox"/> Flat plate <input type="checkbox"/> Evacuated tube	Projected energy cost savings in first year of operation	
What purpose will the system be used for? <input type="checkbox"/> Water heating <input type="checkbox"/> Space heating <input type="checkbox"/> Other	Is water storage tank/heater included in system? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, volume of tank (gallons):	
Expected installation completion date	Expected life of system (years)	Total installed system cost \$
Installer/supplier business name	Installer/supplier contact name	Installer/supplier email
Additional notes		

☐ Ground source heat pump/Geothermal heat pump

Location of any trenching, excavation, well drilling, source wells or discharge wells must be noted on site map.

Heating/cooling capacity (tons)	Projected energy cost savings in first year of operation \$	
Will the system use a horizontal or vertical loop field? <input type="checkbox"/> Horizontal <input type="checkbox"/> Vertical	Will the system be closed loop or open loop? <input type="checkbox"/> Closed <input type="checkbox"/> Open	
Will the system discharge water? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, how many gallons per minute? <input type="checkbox"/> N/A	
Discharge method or location <input type="checkbox"/> N/A		
What purpose will the system be used for? <input type="checkbox"/> Space heating <input type="checkbox"/> Space cooling <input type="checkbox"/> Water heating <input type="checkbox"/> Other:		
Expected installation completion date	Expected life of system (years)	Total installed system cost \$
Installer/supplier business name	Installer/supplier contact name	Installer/supplier email
Additional notes		

☐ Other alternative energy system

Please provide a description of other alternative energy system(s), including energy source, generating capacity, projected annual energy production, projected energy cost savings, expected completion date, expected life of the system, total installed cost and any additional notes in Part 8 of this application form.

### 3c. Energy Conservation Measures

Energy saving measures may be included in the loan request for an alternative energy system; however, energy conservation measures may not be financed through the AERLP as a stand-alone project. Please provide a

description of proposed energy conservation measures, including R-value for insulation, U-value for windows, projected energy and cost savings (if known), expected completion date, expected life of the system, itemized bid or invoice, and any additional notes in Part 8 of this application form.

## PART 4: PROJECT COSTS, OTHER FUNDING & LOAN REQUEST

### 4a. Summary of Project Costs

List total installed cost of each alternative energy system and energy conservation measure included in loan request. Applicant must attach itemized bids or invoices for each system or measure.

Energy system(s) and conservation measure(s)	Total installed cost
1.	\$
2.	\$
3.	\$
<b>Total project cost</b> (sum of lines 1-3)	<b>\$</b>

### 4b. Loan Request

List loan request and estimate fees and closing costs below. Closing costs are generally included in total loan amount and are taken from loan proceeds by the Montana Business Assistance Connection, AERLP's financial services provider; however, applicant may request to pay fees separately. Actual fees and loan amount will be detailed in loan commitment statement provided to applicant upon application approval.

1. <b>Loan Request</b> (may not exceed \$40,000)	\$
2. Origination fee* (2% of loan request or \$250, whichever is greater)	\$
3. Other closing costs* (estimated \$200)	\$ 200.00

*\*These are estimates. Actual fees and approved loan amount will be detailed in loan commitment statement.*

### 4c. Other Funding

If loan amount does not cover total project cost, please list other funding sources (e.g., grant, cash, financing).

Funding source	Amount
1.	\$
2.	\$
<b>Total funding</b> (sum of lines 1-2)	<b>\$</b>

## PART 5: SUPPORTING DOCUMENTATION

### 5a. Application Checklist – Additional Documentation May Be Required Upon Request

Submit the following supporting documentation and materials to DEQ:

- ☐ Completed, initialed, and signed application form (this form).
- ☐ Project proposal including itemized bid or invoice listing model(s) and quantities of equipment.
- ☐ Energy analysis, including projected annual energy production, and annual energy consumption at facility where energy project will be located, based on recent energy bills or usage history. For off grid or new construction projects, include a load sheet documenting major sources of energy usage (i.e., HVAC, lighting, appliances, etc.).
- ☐ Product brochures for each major piece of equipment to be financed (i.e., PV panels and inverter).
- ☐ Site map showing where equipment will be installed, including area of all excavation. A copy of an internet-based satellite map with project location and soil disturbance indicated is sufficient.
- ☐ Copy of asbestos inspection report completed by an accredited asbestos inspector, excluding installations on new construction or residential buildings with 4 or fewer dwelling units.
- ☐ Copy of most recent fiscal year-end business profit and loss statement, balance sheet, and tax return.
- ☐ Copy of business organizational documents, e.g., articles, bylaws, operating agreement.

## PART 6: CERTIFICATIONS

**6a. APPLICANT(S) AUTHORIZE** the Montana Department of Environmental Quality (DEQ) Alternative Energy Revolving Loan Program (AERLP) and contractors of the AERLP to verify any facts it deems necessary for loan analysis, including contacting, without further notice, any bank, credit reporting and credit bureau agencies and associations to obtain credit information.

**Applicant initials**

X

**6b. APPLICANT(S) UNDERSTAND AND AGREE THAT IF APPROVED FOR THE LOAN:** 1) applicant(s) shall provide Montana DEQ with photographs of the alternative energy system and any energy conservation measure no more than thirty (30) days after installation to verify eligible use of loan funds; 2) applicant(s) shall provide Montana DEQ with a copy of the utility interconnection agreement, where applicable, and approved inspection record for each applicable permit no more than thirty (30) days after installation; 3) during the construction and/or installation phase of the project, if requested by DEQ, applicant(s) shall provide oral or written progress reports; 4) DEQ may conduct site visits to verify installations and the applicant shall allow DEQ to access the project at reasonable times for this purpose; 5) applicant(s) shall maintain records, documents, and other information relating to the loan project and shall maintain records sufficient to account for all funds received and expended pursuant to the loan; 6) applicant(s) authorize(s) DEQ to use project information and project photos submitted by applicant to explain or promote the loan program; and 7) either state or federal funds will be used for the loan, and all records, reports, and other documents that relate to the project are subject to audit by the U.S. Department of Energy, office of the Montana legislative auditor, DEQ, and where required by law, the Montana legislative fiscal analyst.

**Applicant initials**

X

**6c. APPLICANT(S) CERTIFY AS FOLLOWS:** 1) that applicant(s) will notify DEQ immediately of any material changes in this application; 2) that applicant(s) will use loan proceeds only to construct the energy project described, at the location listed in this application; 3) that the applicant(s) will comply with all applicable rules and laws intended to preserve or enhance environmental quality; 4) that applicant(s) will obtain all applicable utility, local, state, and federal permits, approvals, and licenses, and comply with their conditions and terms; 5) that no applicant or immediate family member of an applicant is a DEQ employee whose duties are directly related to energy conservation or alternative energy or a DEQ contractor whose duties are directly related to energy conservation or alternative energy at the time of the application; and 6) that the energy generated by the proposed project will be for the sole use of the customer-generator or for net metering, and will not be sold to a third party.

**Applicant initials**

X

**6d. APPLICANT(S) CERTIFY AS FOLLOWS:** I certify that, to the best of my knowledge and belief, the information included with this Application, including all supporting documentation, is true and correct.

**Applicant signature**

X

**Date**

**Applicant name (printed)**

**Title**



## PART 7: INSTRUCTIONS TO SUBMIT APPLICATION

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### 7a. Instructions to Submit Application

Due to personally identifiable information, applications are **not** accepted by email. However, a secure electronic file submittal is accepted through the Montana File Transfer Service ([transfer.mt.gov](https://transfer.mt.gov)). For questions regarding the File Transfer Service please contact program staff. You may also mail or deliver application and supporting documentation to:

*Alternative Energy Revolving Loan Program  
Montana Department of Environmental Quality  
1520 East 6<sup>th</sup> Avenue  
Helena, MT 59601*

### 7b. For More Information, Contact:

Meranda Bass  
Phone: (406) 444-6586  
E-mail: [msikes@mt.gov](mailto:msikes@mt.gov)

Bill Webb  
Phone: (406) 444-6465  
E-mail: [biwebb@mt.gov](mailto:biwebb@mt.gov)

Website: <https://deq.mt.gov/energy/Programs/AERLP>

## PART 8: ADDITIONAL INFORMATION

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Provide additional details below, as needed.