

Alternative Energy Revolving Loan Program (AERLP)

Business Application Form

☐ USDA Workshop ☐ News PART 1: BUSINESS INFO	:	ine AC	ı 🗆 ramıly/mena L	J Omer:		
	RMATION					
1a. Business Profile						
Legal name of business			DBA			
Mailing address		City		State	Zip	
Street address Same as r	nailing address	City		State	Zip	
Tax Identification Number	Phone number		Fax number	Website		
Authorized business represen	ntative Title		Phone number	Email a	ddress	
Type of business entity ☐ Sole Proprietorship ☐ Ge ☐ Limited Partnership ☐ Lir				on 🗆 Lin	nited Liabi	lity Company
Description of business						
Net annual sales/revenue \$	Gross profit		Net operating prof	it	Net profi	t/loss
Number of employees	Date business establish	ned	Years in current ow	nership	Number	of locations
Has this business previously r ☐ Yes ☐ No If yes, what y		}				
Do any owners of the busine	ess have a lock on their o	credit	\$ *			☐ Yes ☐ No
Has the business or person with an equity interest in the business ever declared bankruptcy? **					otcy? **	☐ Yes ☐ No
Is the business or any owner a party to any lien or lawsuit? **					☐ Yes ☐ No	
Are there any delinquent payroll, income or property taxes owed by the business? **					☐ Yes ☐ No	
Is the business for sale or under agreement that would change the persons who hold an equity interest in the business? **					☐ Yes ☐ No	
Has the business name changed in the last 5 years? **						☐ Yes ☐ No
*Running a credit check is part o to lock their credit so it cannot be **If the answer to any of these qu	e accessed without authori	zation.			access indi	viduals may choose

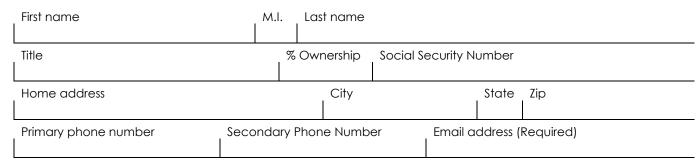
1b. Business Debt Schedule

Creditor	Date opened	Opening balance	Interest rate	Monthly payment	Maturity date	Collateral
		\$	\$	\$		
		\$	\$	\$		
		\$	\$	\$		
		Total:	\$ Total:	\$		

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



2b. Owner Annual Income

Category		Annual income
Employer:		\$
Investment income		\$
Real estate income		\$
Other:		\$
	Total annual income	\$

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:	
	\$
Total assets	\$

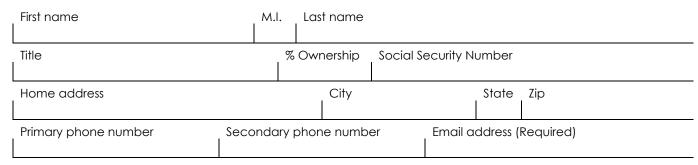
2d. Owner Liabilities

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:		
	\$	\$
Total liabilities	\$	\$

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



2b. Owner Annual Income

Category		Annual income
Employer:		\$
Investment income		\$
Real estate income		\$
Other:		\$
	Total annual income	\$

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:	
	\$
Total assets	\$

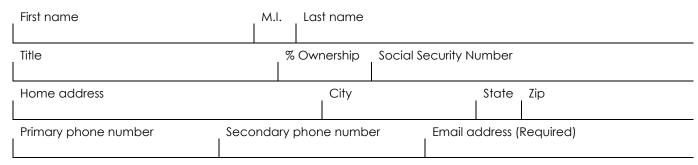
2d. Owner Liabilities

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:		
	\$	\$
Total liabilities	\$	\$

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



2b. Owner Annual Income

Category		Annual income
Employer:		\$
Investment income		\$
Real estate income		\$
Other:		\$
	Total annual income	\$

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:	
	\$
Total assets	\$

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:		
	\$	\$
Total liabilities	\$	\$

PART 3: PROJECT INFORMATION

3a. Pro	oject Location and Site Review				
Street	address	City		State MT	Zip
Count	ty	Re	servation		
					□ N/A
	u own or lease the property where project is	s located?	Year structur	re(s) buil	It where project is located
	n □ Lease*				☐ New construction
Natior I	ny of the structures on the property listed in t nal or State Register of Historic Places or Distr		or critical habit		ned or endangered species ffected by project?
L	: □ No ere be any excavation, trenching, or land d	listurbance (Yes No	Will any	water bodies be affected
with th	ne project?		1	by the p	project?
	□ No If yes, estimate disturbed area (squ			□ Yes [∐ No
contro	ur knowledge, has this project generated pu oversy?	DIIC CONCEI	n oi I		
	icant leases the property, please include a	letter from o	wher granting he	armission	o for the project to proceed
Check necessor	ternative Energy System Information and complete sections for all technologies ary. Installer or supplier may be able to assist ar photovoltaic (PV) or Wind	that will be i			
	, ,	Drojooto	d anaray produc	tion in fi	ret voor of approximation (WMb)
	Generating capacity (kW)	Projecte	a energy produc	tion in fi	rst year of operation (kWh)
	Current annual energy usage (kWh)	Projecte \$	d energy cost sa	vings in	first year of operation
	Percentage of offset (production divided by usage)		s over 110%, plec d system (Use Par		ide explanation of eeded):
	Will system be connected to the grid? ☐ Yes ☐ No If yes, to what utility?		Does the system		e batteries? Yes No
	Mounting system (solar only)		Tower height, fee		
	□ Rooftop □ Ground □ N/A		Tower rieigni, let	er (wirid	□ N/A
	Expected installation completion date	Expected li	fe of system (yea	1	Total installed system cost \$
	Installer/supplier business name	Installer/su	pplier contact no	ame l	Installer/supplier email
	Additional notes			·	
☐ Bior	mass combustion device/Wood stov	ve/Pellet s	tove		_
	Heating capacity (BTU/hr.) Rated eff	ficiency (%)	Projected an	nount of	fuel burned annually □ Cords □ Pounds
	Fuel source	Proie	ected energy cos	st savina	s in first year of operation
	☐ Cord wood ☐ Pellets ☐ Other:	\$	2 2 3, 300	9	,
		Ι Ψ			

	Installer/supplier business name	Installer/	supplier contact name	Installer/supplier email
	Additional notes			I
□ Sola	r thermal/Solar hot water			
	Total collector surface area (sq. ft.)	Projected	energy production in fir	st year of operation (MMBTU)
	Type of collectors ☐ Flat plate ☐ Evacuated tube	Projected	d energy cost savings in	first year of operation
	What purpose will the system be used fo □ Water heating □ Space heating □	1	Is water storage tank/ha ☐ Yes ☐ No If yes, vol	eater included in system? lume of tank (gallons):
	Expected installation completion date	•	d life of system (years)	Total installed system cost
	Installer/supplier business name	Installer/s	supplier contact name	Installer/supplier email
	Additional notes			
	und source heat pump/Geotherm of any trenching, excavation, well drilling Heating/cooling capacity (tons)	ng, source v	vells or discharge wells n	nust be noted on site map. gs in first year of operation
	Will the system use a horizontal or vertice ☐ Horizontal ☐ Vertical	cal loop fiel	d? Will the system be ☐ Closed ☐ Op	e closed loop or open loop? en
	Will the system discharge water? ☐ Yes ☐ No		If yes, how many gallo	ns per minute?
	Discharge method or location			□ N/A
	What purpose will the system be used to Space heating Space cooling		ating 🗆 Other:	
	Expected installation completion date	Expecte	d life of system (years)	Total installed system cost
	Installer/supplier business name Ir	nstaller/sup	plier contact name	Installer/supplier email
	Additional notes			
Pleas	Ler alternative energy system se provide a description of other alternative scity, projected annual energy production			

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

expected life of the system, total installed cost and any additional notes in Part 8 of this application form.

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.	\$
Total project cost (sum of lines 1-3)	\$

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. Loan Request (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.	\$
Total funding (sum of lines 1-2)	\$

PART 5: SUPPORTING DOCUMENTATION

5a. Application Checklist – Additional Documentation May Be Required Upon Request
Submit the following supporting documentation and materials to DEQ:
\square Completed, initialed, and signed application form (this form).
\square Project proposal including itemized bid or invoice listing model(s) and quantities of equipment.
\square 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.).
\square Product brochures for each major piece of equipment to be financed (i.e., PV panels and inverter).
\square Site map showing where equipment will be installed, including area of all excavation. A copy of an internet-
pased satellite map with project location and soil disturbance indicated is sufficient.
\square 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.
\square Copy of most recent fiscal year-end business profit and loss statement, balance sheet, and tax return.
\square 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	
Χ	

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

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). 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 6th Avenue Helena, MT 59601

7b. For More Information, Contact:

Meranda Bass

Phone:(406) 444-6586 E-mail: msikes@mt.gov

Bill Webb

Phone: (406) 444-6465 E-mail: biwebb@mt.gov

Website: https://deg.mt.gov/energy/Programs/AERLP

PART 8: ADDITIONAL INFORMATION

Provide additional details below, as needed.