

**APPLICATIONS FOR RENEWAL OR UPDATE
OF
CONSERVATION SERVICE PROVIDER (CSP) REGISTRATION**

Instructions: One of the following applications may be used by a registered Conservation Service Provider (CSP) to renew or update CSP Registration as follows:

I am renewing my CSP Registration according to the normal two year renewal cycle and have no changes to my prior application – Use the Application for Renewal of CSP Registration – No Changes Incurred to Application of Record. This application should be used when there are NO CHANGES to the CSP Application of record. The filing fee for renewal is \$25.

I am renewing my CSP Registration according to the normal two year renewal cycle and have changes to my prior application – Use the Application for Renewal of CSP Registration – Changes Incurred to Application of Record. This application should be used when there are one or more CHANGES to the CSP Application of record. The Applicant is also required to submit a newly completed CSP Application. The filing fee for renewal is \$25.

I am updating my CSP Registration information prior to my next required renewal – Use the Application to Update CSP Registration. This application should be used by a currently approved, registered CSP in order to update one or more items of the CSP Application of record. The Applicant is also required to submit a newly completed CSP Application. There is no filing fee to update CSP Registration information of record.

In all three cases listed above, the registered CSP is required to conduct a thorough review of the individual items, parts and subparts of the Applicant's CSP Application of record, which may be obtained by searching the Pennsylvania Public Utility Commission (PUC) website at www.puc.pa.gov.

- *Double click "Search Documents" located on the upper right-hand corner of the PUC website.*
- *Type the last seven (7) digits of your PUC Docket No. for "Docket No."*
- *Click button labeled "Search."*

An entity that uses one of the three applications to renew CSP Registration or to update CSP Registration information, shall be held accountable for identifying each and every item that has changed or contains information that has changed relating to the Commission-approved Application currently on file at the Commission.

File a signed and verified original and one copy of the completed application along with any attachments in person or by first class mail, with your check (if applicable) to the following address:

Filing in person:

Secretary
Pennsylvania Public Utility Commission
Commonwealth Keystone Building
400 North Street
Harrisburg, PA 17120

Filing by first-class Mail:

Secretary
Pennsylvania Public Utility Commission
P. O. Box 3265
Harrisburg, PA 17105-3265

**APPLICATION FOR RENEWAL OF CSP REGISTRATION
NO CHANGES INCURRED TO APPLICATION OF RECORD**

Applicant (Company) Name and Docket No.:

Contact Information (name, address, phone number and email of person filing application):

On behalf of the Applicant I am filing with the Commission this Application for Renewal of CSP Registration. There are NO CHANGES to the Applicant's CSP Application of record on file at the Commission at the Docket Number as indicated herein.

I have reviewed the Applicant's CSP Application of record and no information contained therein has changed. Furthermore, no compliance issues have occurred relating to the Applicant's CSP Application of record regarding responses to Questions 4.a – 4.d. Enclosed are the following items:

- a. Attachment providing all information relating to "Identity of the Applicant," pursuant to Question Nos. 1(a)-1(j) of the CSP Application;
- b. Renewal application fee of \$25;
- c. Affidavit, attesting to the truth and knowledge of these facts; and
- d. Proof of current liability insurance coverage.

Name and Title of person authorized by Applicant to file this Application

Signature

Date

The Applicant understands that the making of false statement(s) herein may be grounds for denying the Application for Renewal of Conservation Service Provider Registration, or if later discovered, for revoking any authority granted pursuant to the Application. This Application is subject to 18 Pa. C.S. §§4903 and 4904, relating to perjury and falsification in official matters.

**APPLICATION FOR RENEWAL OF CSP REGISTRATION
CHANGES INCURRED TO APPLICATION OF RECORD**

Applicant (Company) Name and Docket No.:
Power TakeOff, Inc. A-2020-3020266

Contact Information (name, address, phone number and email of person filing application):

Peter Widmer

1750 30th St, #420, Boulder CO 80301

303-803-8020 peter.widmer@powertakeoff.com

On behalf of the Applicant I am filing with the Commission this Application for Renewal of CSP Registration. There are one or more CHANGES to Applicant's CSP Application of record on file at the Commission at the Docket Number as indicated herein.

I have reviewed the Applicant's CSP Application of record and the information contained therein has changed. Enclosed are the following items:

- a. Completed CSP Application;
- b. Renewal application fee of \$25;
- c. Affidavit, attesting to the truth and knowledge of these facts; and
- d. Proof of current liability insurance coverage.

Peter Widmer

Name and Title of person authorized by Applicant to file this Application

Peter Widmer

Signature

May 16, 2022

Date

The Applicant understands that the making of false statement(s) herein may be grounds for denying the Application for Renewal of Conservation Service Provider Registration, or if later discovered, for revoking any authority granted pursuant to the Application. This Application is subject to 18 Pa. C.S. §§4903 and 4904, relating to perjury and falsification in official matters.

APPLICATION TO UPDATE CSP REGISTRATION

Applicant (Company) Name and Docket No.:

Contact Information (name, address, phone number and email of person filing application):

On behalf of the Applicant I am filing with the Commission this Application to Update CSP Registration information. The Applicant acknowledges that there is no fee associated with the update of CSP registration information contained in its Application on file at the Docket Number as indicated herein.

I have reviewed the Applicant's CSP Application of record and the information contained therein has changed. Enclosed are the following items:

- a. Completed CSP Application; and
- b. Affidavit, attesting to the truth and knowledge of these facts.

I have indicated "None" or "Changes" in each category as follows, relating to the Applicant's CSP Application of record.

1. Identity of the Applicant:
2. Registered Agent:
3. Applicant's Operations:
4. Compliance:

Name and Title of person authorized by Applicant to file this Application

Signature

Date

The Applicant understands that the making of false statement(s) herein may be grounds for denying the Application to Update Conservation Service Provider Registration, or if later discovered, for revoking any authority granted pursuant to the Application. This Application is subject to 18 Pa. C.S. §§4903 and 4904, relating to perjury and falsification in official matters.

AFFIDAVIT

[Commonwealth/State] of Florida _____ :

: ss.

County of Lee _____ :

Peter Widmer _____, Affiant, being duly [sworn/affirmed] according to law, deposes and says that:

[He/she is the Chief Business Officer (Office of Affiant) of Power TakeOff, Inc. (Name of Applicant);]

[That he/she is authorized to and does make this affidavit for said Applicant;]

That the Applicant herein Power TakeOff, Inc has the burden of producing information and supporting documentation demonstrating its technical and financial fitness to be registered as a conservation service provider pursuant to Act 129 of 2008.

That the Applicant herein Power TakeOff, Inc acknowledges that it has answered the questions on the application correctly, truthfully and completely and has provided supporting documentation as required.

That the Applicant herein Power TakeOff, Inc acknowledges that it is under a duty to update information provided in answer to questions on this application and contained in supporting documents.

That the Applicant herein Power TakeOff, Inc acknowledges that it is under a duty to supplement information provided in answer to questions on this application and contained in supporting documents as requested by the Commission.

That the facts above set forth are true and correct to the best of his/her knowledge, information, and belief, and that he/she expects said Applicant to be able to prove the same at hearing.

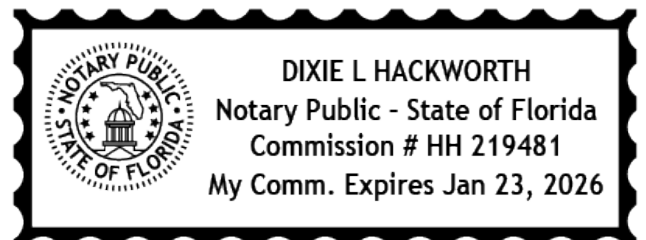
Peter Widmer _____
Signature of Affiant

Signer(s) Peter Widmer ,produced,USA Passport, as identification, along with multi-factor KBA authentication and was notarized online using audio/video recording.

Sworn and subscribed before me this 16th day of May, 2022.

Dixie L Hackworth Online Notary

Dixie L Hackworth _____
Signature of official administering oath



My commission expires: January 23, 2026

**CONSERVATION SERVICE PROVIDER (“CSP”) APPLICATION
FOR REGISTRATION IN THE COMMONWEALTH OF PENNSYLVANIA**

Conservation Service Providers (“CSPs”) have a specific role under Act 129, which requires a covered Electric Distribution Company’s Energy Efficiency and Conservation (EE&C) plan to include one or more CSPs to implement at least a portion of the EE&C Plan. 66 Pa.C.S. § 2806.1(b)(1)(i)(E). CSPs provide information and technical assistance to EDCs on *measures* that enable a person to increase energy efficiency or reduce energy consumption. CSPs must have no direct or indirect ownership, partnership or other affiliated interest with an EDC. 66 Pa.C.S. § 2806.1 (m). Only registered CSPs may advise an EDC and/or provide consultation, design, or administration or management services to an EDC related to the implementation of the EDC’s EE&C Plan. As such, registration of business entities as approved CSPs is required before entering into a contractual agreement with an EDC exclusively for the provision of consultation, design, administration, management or advisory services regarding that EDC’s EE&C plan. This registry is not intended as a resource for business, whose sole purpose is the installation of measures, supplying of equipment or other contracting work for use by the general public and EDC customers. If providing such services, registration as a CSP is not required for entering into an agreement with an EDC.

Any CSP subcontractor with an annual contract cost that equals or exceeds 10% of the CSP annual contract cost and is directly performing services pursuant to a contract with a CSP which has contracted with an EDC after Commission approval should also register as a CSP. This does not include third party contractors which participate in or support an EE&C Plan but are not directly contracted with a CSP which has a direct contractual relationship with the EDC subject to Act 129.

To qualify an applicant must have at least two years of experience in providing program consultation, design, administration, management or advisory services related to energy efficiency and conservation services. CSP registration is not required of entities that limit their services to the installation of energy efficiency measures or the provision of equipment or materials to EDC customers or the public in general.

1. IDENTITY OF THE APPLICANT

- a. Legal Name of Applicant: Power TakeOff, Inc.

Attach proof of compliance with appropriate Pennsylvania Department of State filing requirements.¹

Pennsylvania Department of State filing details for Power TakeOff Inc. are attached to this application as **EXHIBIT A – PROOF OF FILING COMPLIANCE**.

¹ A copy of any document from the Pennsylvania Department of State (Pa. Dept. of State) documenting the Applicant’s Pa. Dept. of State entity number is adequate. However, the document must indicate that the Applicant’s Pa. Dept. of State registration is “active.” Certified copies of Pa. Dept. of State documents are not required.

b. Trade or Commercial or Fictitious Names Used by Applicant (d/b/a)—List all that apply.

- The Applicant will be using a fictitious name or doing business as (“d/b/a”). Identify names below. If more space is needed, list names on the back of this page or append list to completed application.
- The Applicant will not be using a fictitious name.

c. Applicant Address: 1750 30th St, #420, Boulder, CO 80301

d. Applicant Telephone No: 1-800-303-9890

e. Applicant Email Address: kevin.martin@powertakeoff.com

f. Contact Information for Applicant. PLEASE NOTE: Upon approval of this application, this Contact Information will be listed on the Commission’s CSP Registry.

- Name: Peter Widmer
- Mailing Address: 1750 30th St, #420, Boulder, CO, 80301
- Telephone: 303-803-8020
- Email Address: peter.widmer@powertakeoff.com

g. Predecessor(s) & Other Names used by Applicant for past five (5) years of date of this application. Provide Name(s), Address(es) and Telephone No.(s).

- Check Box if any Predecessor(s) is currently or was previously registered in Pennsylvania as a CSP. If affirmative, please provide Docket No(s). (A-[Year]-[Seven (7) Digits]) and names for all registered CSPs.

N/A.

h. Parent & Subsidiary Companies & Affiliates:

- Parent Name and Contact Information. Provide name and contact information for parent company. Check Box if any parent company is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If “None,” do not check the box and answer “None” below.

None.

- Subsidiaries and Contact Information. Provide name and contact information for all subsidiary companies. Check Box if any subsidiary is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If “None,” do not check the box and answer “None” below.

None.

- Affiliate(s) and Contact Information. Provide name and contact information for all affiliate companies. Check Box if any affiliate is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If “None,” do not check the box and answer “None” below.

Power TakeOff Canada, Inc. 5-420 Erb St W, Suite 206, Waterloo, Ontario, Canada N2L 6K6
Kevin Martin, kevin.martin@powertakeoff.com, 800-303-9890

i. Contracts & Business Partnerships:

- Check Box if Applicant intends to or has operated under contract with or has partnered with an EDC within the past five (5) years. If “None,” do not check the box and answer “None” below.
- Check Box if Applicant intends to or has operated under contract (subcontractor) with or has partnered with a CSP within the past five (5) years. If “None,” do not check the box and answer “None” below.

If any box above is checked, please provide name(s) of EDC(s) and CSP(s) and contact information for each and briefly describe the nature of business services associated with each contract and/or partnership.

EDCs Power TakeOff has operated under contract within the past 5 years:

1. Xcel Energy
 - Brent Valenchenko, Product Portfolio Manager
 - Brent.A.Velenchenko@xcelenergy.com
 - (763) 232-2295
 - Power TakeOff provides Xcel Energy with data analytics services and Energy Intelligence Software (EIS) services and support.
2. ComEd
 - Wisit Kumphai, Sr Energy Efficiency Program Manager
 - Wisit.Kumphai@ComEd.com
 - (630) 891-7448
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
3. Ameren IL
 - Ron Ingram, Program Manager
 - Ronald.w.ingram@leidos.com
 - 309-213-5585
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
4. DTE Energy
 - Tyson Armstrong
 - Tyler.armstrong@esciences.us
 - 248-430-5569
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
5. Ft. Collins Utilities
 - David Suckling, Business Energy Efficiency
 - dsuckling@fcgov.com
 - (970) 416-4251
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
6. BC Hydro
 - Paul Seo, Program Manager
 - paul.seo@bchydro.com
 - (604) 623-4386
 - Power TakeOff implemented VCx, data analytics, and energy efficiency reporting services under the DSM portfolio.
7. Southern California Edison
 - Angel De La Isla, Project Manager
 - Angel.delaisla@sce.com
 - (626) 302-0718
 - Power TakeOff implemented the Facility Assessment Services Program under the DSM portfolio.

8. San Diego Gas & Electric
 - Zach Shumake
 - ZShumake@sdge.com
 - (619) 676-7902
 - Power TakeOff implemented the Facility Assessment Services Program under the DSM portfolio.
9. Duquesne Light Company
 - Liz McQuaide, Program Manager
 - EMcQuaide@franklinenergy.com
 - 412-290-3888
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
10. Washington Gas
 - Hillary Tipton, Sr. Energy Efficiency Program Specialist
 - Hillary.tipton@washgas.com
 - 571-455-8965
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
11. Baltimore Gas & Electric
 - Jonathan Becker, Program Manager
 - Jonathan.Becker@icf.com
 - 443-280-5581
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
12. Pepco MD
 - Dan Anderson, Energy Engineer
 - danderson@pepco.com
 - 202-495-0669
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
13. Delmarva
 - Dan Anderson, Energy Engineer
 - danderson@pepco.com
 - 202-495-0669
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
14. MN Power
 - Emily Heiken, Programs and Services Rep
 - eheiken@mnpower.com
 - 218-355-3070
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
15. Puget Sound Energy
 - Tyson Schmitt
 - Tyson.Schmitt@pse.com
 - 360.570.6806
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
16. Georgia Power
 - Tony Donald
 - jadonald@southernco.com
 - 404-983-8022

- Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
- 17. United Illuminating
 - Brandon Mark, Program Manager
 - bmark@uinet.com
 - 202-506-7487
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
- 18. Southern Connecticut Gas
 - Brandon Mark, Program Manager
 - bmark@uinet.com
 - 202-506-7487
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.
- 19. Focus on Energy
 - Courtney Wojcik, Business Portfolio Manager
 - 920-562-4177
 - courtney.wojcik@focusonenergy.com
 - Power TakeOff implements VCx energy efficiency services under the DSM portfolio.

CSPs Power TakeOff has operated under contract within the past 5 years:

1. Resource Innovations
 - Josh Beeber, Program Manager
 - jbeeber@resource-innovations.com
 - 630-320-7961
2. Franklin Energy
 - Liz McQuaide, Program Manager
 - EMcQuaide@franklinenergy.com
 - 412-290-3888
3. Energy Sciences
 - Tyson Armstrong
 - Tyler.armstrong@esciences.us
 - 248-430-5569
4. Aptim
 - Courtney Wojcik, Business Portfolio Manager
 - 920-562-4177
 - courtney.wojcik@focusonenergy.com
5. ICF
 - Jonathan Becker, Program Manager
 - Jonathan.Becker@icf.com
 - 443-280-5581
6. Leidos
 - Ron Ingram, Program Manager
 - Ronald.w.ingram@leidos.com
 - 309-213-5585

j. Identify principal officers (owners, executives, partners and/or directors), as appropriate for Applicant’s organizational structure. Provide an organizational chart and the names, titles, business addresses and telephone numbers for each office.

Power TakeOff has a Board of Directors comprised of the following 6 directors:

1. Robert Nally – Chair
2. Kevin Martin – Treasurer and Secretary
3. Donald McMurtry
4. John Fast
5. Kenneth Gingrich
6. Peter Widmer

Power TakeOff has 3 corporate officers that represents the company’s executive team, that operate from the 2 business addresses as follows:

Robert Nally - President

- Ontario Office: 420 Erb St W, Suite 206, Waterloo, Ontario, Canada N2L 6K6
- 800-303-9890 x100

Kevin Martin – Chief Operating Officer

- Ontario Office: 420 Erb St W, Suite 206, Waterloo, Ontario, Canada N2L 6K6
- 800-303-9890 x200

Peter Widmer – Chief Business Officer

- Denver Office: 1750 30th St, #420, Boulder CO 80301
- 800-303-9890 x310

A high level organizational chart is attached to this application as **EXHIBIT B – ORGANIZATIONAL CHART.**

k. Attach to this Application a brief biography or single page professional resume for all principal officers and management directly responsible for Applicant’s operations.

Resumes or biography information for all principal officers and senior management are attached to this application as **EXHIBIT C – RESUMES.**

l. Provide Applicant’s Employer Identification No. (EIN): 26-0407013

2. **REGISTERED AGENT**

- a. If the Applicant does not maintain a principal office in the Commonwealth, the Applicant is required by the Pennsylvania Department of State to designate an approved Registered Agent as its representative in the Commonwealth. Check one of the Boxes below, as applicable:

YES, the Applicant has registered its business with the Pennsylvania Department of State. Following is the Name and Contact information for the Applicant's Department-Approved Registered Agent.

- Registered Agent's Name:
 - Registered Agents Inc
- Registered Agent's Mailing Address:
 - 1150 First Ave, Ste 511, King of Prussia, PA 19406
- Registered Agent's Telephone: 512-692-4661
- Registered Agent's Email Address: legal@powertakeoff.com

NO, the Applicant has not registered its business with the Pennsylvania Department of State. STOP—To avoid denial of your application and forfeiture of your application fee, you should contact the Pennsylvania Department of State Bureau of Corporations to register as a business entity within the Commonwealth PRIOR TO completion and filing of this application with the Pennsylvania Public Utility Commission.

b. Applicant has registered its business with the Pennsylvania Department of State. Please check appropriate registration type for Applicant as designated with the Department.

- Sole proprietor (15 Pa. C.S. §4124)
- Domestic corporation (none)
- Domestic general partnership (15 Pa. C.S. §4124)
- Domestic limited liability company (15 Pa. C.S. §8913)
- Domestic limited liability partnership (15 Pa. C.S. §8201)
- Foreign corporation (15 Pa. C.S. §4124)
- Foreign general or limited partnership (15 Pa. C.S. §4124)
- Foreign limited liability company (15 Pa. C.S. §8981)
- Foreign limited liability general partnership (15 Pa. C.S. §8211)
- Foreign limited liability limited partnership (15 Pa. C.S. §8211)

c. If Applicant is not domiciled in the Commonwealth of Pennsylvania and is registered as a “foreign” entity as identified in Question 2.b., please identify all other states where applicant is registered and name the appropriate state department(s):

- Colorado – registered with Colorado Secretary of State
- Idaho – registered with Idaho Secretary of State
- Texas – registered with the Office of the Comptroller for the right to transact business in Texas
- Washington – registered with the State of Washington Secretary of State

3. **APPLICANT'S OPERATIONS**

Respond to each of the following four questions relating to Applicant's operations and its technical and financial fitness. Respond to each item and attach any additional information and/or statements to this Application as appropriate.

a. Describe nature of business:

Power TakeOff delivers utility energy efficiency program design and implementation services, data analytics services, whole building measurement and verification, and energy management software services directly to utilities and utilities' non-residential customers.

b. Current status of business (check one):

- Applicant is presently doing business in Pennsylvania
- Applicant is presently not doing business in Pennsylvania

c. The Applicant proposes to provide the following information and technical services to an EDC. Check all services that apply and identify all EDCs with whom Applicant intends to conduct business.

- | | |
|--|--|
| <input checked="" type="checkbox"/> Consultation | EDCs: |
| <input checked="" type="checkbox"/> Design | <u>FirstEnergy Utilities: Met-Ed, Penelec, Penn Power,</u> |
| <input checked="" type="checkbox"/> Administration | <u>West Penn Power</u> |
| <input checked="" type="checkbox"/> Management | <u>PECO Energy Company</u> |
| <input checked="" type="checkbox"/> Advisory | <u>PPL Electric Utilities</u> |
| | <u>Duquesne Light Company</u> |
| | <u>UGI Utilities</u> |

d. Attach to this Application a copy of any certification(s) or similar documentation that would demonstrate the technical fitness of Applicant, such as membership in trade associations, professional licenses, technical certifications, and/or names of current or past clients with a description of dates and types of services provided by Applicant.

Certifications demonstrating technical fitness of Power TakeOff, specifically memberships in trade associations, along with names of current clients and types of services provided are attached to this application as **EXHIBIT D – CERTIFICATIONS**.

e. Attach to this Application proof of current liability insurance coverage.

A copy of Power TakeOff's insurance coverage and limits is attached to this application as **EXHIBIT E – INSURANCE COVERAGE**

4. **COMPLIANCE**

Respond to each of the following Questions. Provide a statement as to the resolution or present status of any such proceedings, if applicable.

- a. In the past three years has the Applicant, the parent company, an affiliate or predecessor or partner (contractor/subcontractor business relationship) of the Applicant, or any person identified by the Applicant in this Application, been investigated or convicted of a crime involving fraud, theft, larceny, deceit, violation of consumer protection law, violation of deceptive trade law or similar activity, whether before an administrative body or in a judicial forum, in which the Applicant, an affiliate, a predecessor of either, or a person identified herein has been a defendant or a respondent?

- No
- Yes. Provide explanation:

- b. Is the Applicant, the parent company, an affiliate, or a predecessor of either, currently delinquent with any state or federal taxing authority?

- No
- Yes. Provide explanation:

- c. Identify all bankruptcy or liquidation proceedings for the prior three years. If none, state "None" below.

None.

- d. Identify all customer complaints filed with a regulatory or prosecutor agency for the prior three years of the date of this application. In none, state "None" below.

None.

5. **FALSIFICATION**

The Applicant understands that the making of false statement(s) herein may be grounds for denying the Application, or if later discovered, for revoking any authority granted pursuant to the Application. This Application is subject to 18 Pa. C.S. §§4903 and 4904, relating to perjury and falsification in official matters.

Signature of Principal Official: Peter Widmer

Official's Name & Title : Peter Widmer, Chief Business Officer
(Please Print)

Date : May 16, 2022

APPENDIX A - AFFIDAVIT

[Commonwealth/State] of Florida _____ :

: ss.

County of Lee _____ :

Peter Widmer, Affiant, being duly [sworn/affirmed] according to law, deposes and says that:

[He/she is the Chief Business Officer (Office of Affiant) of Power TakeOff, Inc. (Name of Applicant);]

[That he/she is authorized to and does make this affidavit for said Applicant;]

That the Applicant herein Power TakeOff, Inc has the burden of producing information and supporting documentation demonstrating its technical and financial fitness to be registered as a conservation service provider pursuant to Act 129 of 2008.

That the Applicant herein Power TakeOff, Inc acknowledges that it has answered the questions on the application correctly, truthfully and completely and has provided supporting documentation as required.

That the Applicant herein Power TakeOff, Inc acknowledges that it is under a duty to update information provided in answer to questions on this application and contained in supporting documents.

That the Applicant herein Power TakeOff, Inc acknowledges that it is under a duty to supplement information provided in answer to questions on this application and contained in supporting documents as requested by the Commission.

That the facts above set forth are true and correct to the best of his/her knowledge, information, and belief, and that he/she expects said Applicant to be able to prove the same at hearing.

Peter Widmer

Signer(s) Peter Widmer ,produced,USA
Passport,as identification, along with multi-factory
KBA authentication and was notarized online
using audio/video recording.

Signature of Affiant

Sworn and subscribed before me this 16th day of May, 2022.

Dixie L Hackworth Online Notary

Dixie L Hackworth

Signature of official administering oath

My commission expires: January 23, 2026.

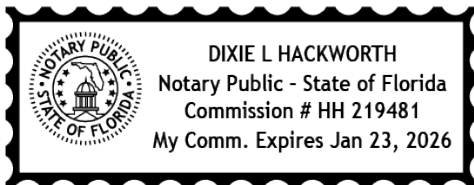


EXHIBIT A – PROOF OF FILING COMPLIANCE

Search entity / Select entity / **Order documents**

Order Business Documents



Date: 05/10/2022

Business Name History

Name	Name Type
Power TakeOff Inc.	Current Name

Business Entity Details Officers

Name	Power TakeOff Inc.
Entity Number	7067198
Entity Type	Business Corporation
Status	Active
Citizenship	Foreign
Entity Creation Date	06/02/2020
Effective Date	06/02/2020
State Of Inc	CO
Address	%Registered Agents Inc Erie

Filed Documents

The information presented below is for your reference. To place an order you will need to log in. If you do not have a PENN File account, you may register for an account by clicking here (/Account/Register_account).

Show entries

Filter Records



Select	Date	Document	Pages	Plain Copy Quantity#	Price	Certified Copy Quantity#	Certified Copy Price	Microfilm #	Microfilm Start	Microfilm End	Line Total
<input type="checkbox"/>	06/02/2020	Foreign Registration Statement 1	2	<input type="text" value="1"/>	\$3.00	<input type="text" value="0"/>	\$40.00				

Showing 1 to 1 of 1 entries

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Next

<input type="checkbox"/>	All Dates	All Certified Copies	2	Quantity # <input type="text" value="1"/>	\$46.00						
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<input type="checkbox"/>	All Dates	All Plain Copies	2	Quantity #	<input type="text" value="1"/>	\$6.00		
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Certified Documents

Select	Date	Document	Pages	Quantity#	Price	Line Total
<input type="checkbox"/>	05/10/2022	Certificate of Registration	1	<input type="text" value="1"/>	\$40.00	
<input type="checkbox"/>	05/10/2022	Index and Docket Report	1	<input type="text" value="1"/>	\$15.00	
<input type="checkbox"/>	05/10/2022	Index and Docket Certified Report	1	<input type="text" value="1"/>	\$55.00	

Order Total :

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EXHIBIT B – ORGANIZATIONAL CHART

Power TakeOff, Inc. Org Chart Management & Departments

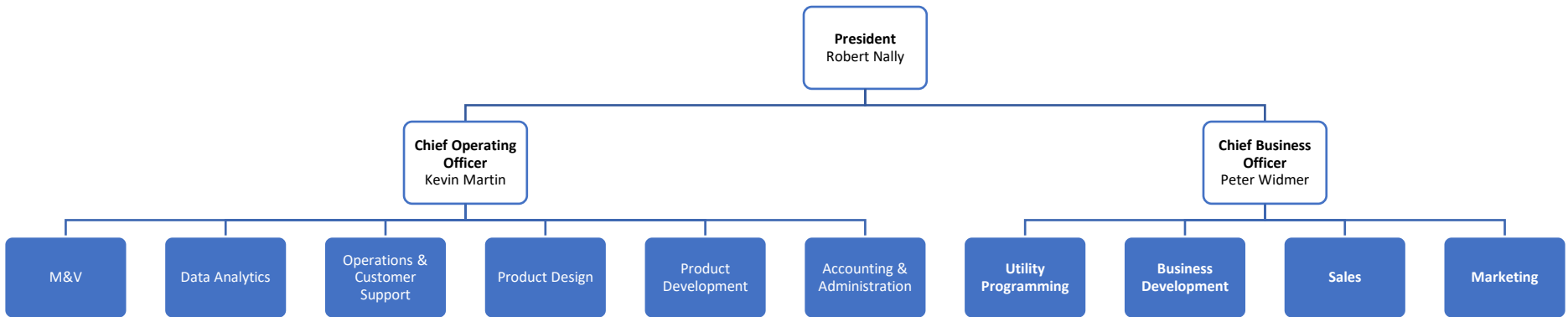


EXHIBIT C – RESUMES

Kevin Martin

Kevin Martin is the Chief Operating Officer for Power TakeOff. From his fourteen years with the Company, Kevin brings a depth of knowledge and experience across many functional areas of the organization, both technical and applied. Kevin has held responsibilities across all elements of energy efficiency programming, including program design, contracting and administration, technical data integration for program delivery, and evaluation support. Since 2008, Kevin has led the technical integration and launch of various Power TakeOff non-residential utility program offerings with Xcel Energy, Commonwealth Edison, Southern California Edison, and San Diego Gas & Electric.

Prior to joining Power TakeOff, Kevin helped manage a municipal composting program, performed home energy efficiency evaluations, and worked as an environmental scientist at both the Toronto airport and for an environmental consulting firm.

Power TakeOff <i>Chief Operating Officer</i>	November 2011 – Present
• Utility Programming Operations	
○ Responsible for program strategy and overview of new program offering design,	
○ Responsible for utility and independent metering infrastructure and data capture integration,	
○ Oversees product development and new product deployment,	
○ Responsible for all utility contracting and administration management.	
<i>Director of Operations</i>	May 2008 – November 2011
City of Waterloo <i>Waste Management, Green Bin Coordinator</i>	January 2008 – May 2008
IRT Consultants <i>Environmental Scientist</i>	May 2007 – December 2007

Education

University of Waterloo, BES <i>Environment & Business</i>	May 2009
Association of Energy Engineers accredited Certified Energy Manager (CEM)	June 2015

Peter Widmer

Peter Widmer is the Chief Business Officer for Power TakeOff responsible for Company strategy, business development and marketing. He also leads the Company's VCx™ Program design strategy and utility partner relationships while providing evaluation support. Prior to joining Power TakeOff, Peter held several sales and marketing roles before transitioning to the energy industry through various domestic and international environmental and energy positions, most recently with the Federal Energy Regulatory Commission in Washington, D.C. Peter is a frequent utility DSM speaker and actively involved in local and national industry associations.

Power TakeOff
Chief Business Officer January 2019 – Present

- Utility Program Strategy and Marketing
 - Responsible for utility program design, marketing, and customer engagement strategies,
 - Lead new utility business development strategy and lead implementation,
 - Design and define Company's marketing strategy and goals,
 - Lead Company partnership and collaboration initiatives.

Vice President, Business Development & Marketing April 2013 – December 2018

Federal Energy Regulatory Commission
Energy Analyst June 2012 – March 2013

Widmer International Consulting
Principal October 2009 – May 2012

Mennonite Central Committee
Director of Environmental & Energy Works Tanzania August 2008 – August 2009

Page 1 Solutions Marketing
Account Manager May 2007 – July 2008

Education

Goshen College, BA
Business May 2007

George Washington University, MBA
Sustainability and Data Analytics May 2013

Emily Startz

Emily Startz manages the implementation of energy efficiency programs and the relationships with Power TakeOff's utility partners. Prior to joining Power TakeOff, Emily managed the development of New York State's commercial energy management initiatives including the design and implementation of a collaborative performance-based energy savings pilot. Emily also has experience managing industrial, small-to-medium business, and low-income utility demand side management programs.

Power TakeOff

Program Manager

May 2019 – Present

- Manage Power TakeOff utility relationships and oversees VCx™ Program implementation team and processes to ensure successful outcome.

NYSERDA

Senior Project Manager

June 2016 – May 2019

- Managed the evolution of commercial energy management initiatives to increase the adoption and development of smart building solutions with grid-edge capabilities,
- Championed the design, development, and execution of a progressive \$30M Pay-for-Performance commercial pilot, with a utility partner, that uses AMI to test and promote a standardized measurement of valuing energy efficiency,
- Oversaw NYSERDA outreach, market engagement, and education strategies in NYC.

Xcel Energy

March 2012 – May 2016

Product Portfolio Manager

- Managed commercial and industrial energy efficiency programs and associated projects that support customer's long-term energy planning and business goals,
- Worked with Engineering and Product Development teams to create a transparent process for soliciting ideas for new program measures,
- Worked with cross-functional team to develop and update regulatory filings to include new and improved measure offerings in demand side management programs.

Colorado Governor's Energy Office

November 2010 – March 2012

Rebate Program Associate

- Managed \$20 million statewide prescriptive renewable energy and energy efficiency.

Education

State University of New York at Albany

MA, Political and Environmental Communication

2008

BA, Communication

2007

Lead Green Associate

2012

Bob Nally

Bob Nally is the President and Chair of the Board of Power TakeOff. Bob, B.A.Sc. EE, P.Eng., MASc is one of the founders of Power TakeOff and has been involved since the company's beginning in 2007. Bob provides strategic direction, oversight, and executive management for the Company. He has a strong electrical and engineering and technology background, has been involved in numerous technology companies as both startups and established organizations.

Bob co-founded RDM Corporation, Virteck Corporation, Biorem Corporation, Certicom Corporation, Xign Corporation, and was also Manager of Strategic Planning and New Business Development and Director of Engineering for NCR Canada Ltd. for 10 years. Additionally, he has served as both a Director and Chairman of the Board of Biorem Inc., Virtek Vision International Inc., RDM Corporation, and JPMorgan Xign Corporation. Bob has over 20 years of venture capital experience as a co-founder and managing partner of Canadian Venture Founders Limited Partnership. Bob also brings significant IP experience to the company, having personally patented 14 technologies.

Bob earned a Bachelor of Science degree in Electrical Engineering and a Master of Science degree in Systems Design Engineering from the University of Waterloo.

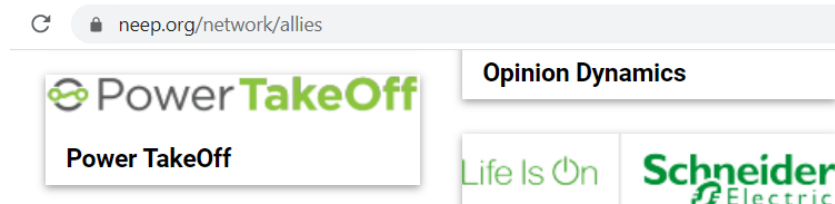
EXHIBIT D – CERTIFICATIONS

TRADE ASSOCIATION MEMBERSHIPS

Power TakeOff holds membership in the below professional industry associations. The name of the association, a link the current membership page where Power TakeOff can be located is provided, along with a screenshot of Power TakeOff listed on the association membership page.

1. NEEP (Northwest Energy Efficiency Partnerships)

- <https://neep.org/network/allies>



2. MEEA (Midwest Energy Efficiency Alliance)

- <https://www.mwalliance.org/membership/member-list>

The screenshot shows the URL [mwalliance.org/membership/member-list](https://www.mwalliance.org/membership/member-list) in the browser address bar. The page displays the MEEA logo (Midwest Energy Efficiency Alliance) and a navigation menu with "Login", "Subscribe", and "MEMBERSHIP". Below the navigation menu is a table listing members:

Power TakeOff, Inc.	2017
Powerley	2018
Recleim	2017
Resource Action Programs	2012

- Furthermore, Power TakeOff recently won an innovation award from MEEA for its utility program work with ComEd. <https://finance.yahoo.com/news/power-takeoff-association-comed-wins-180000864.html>

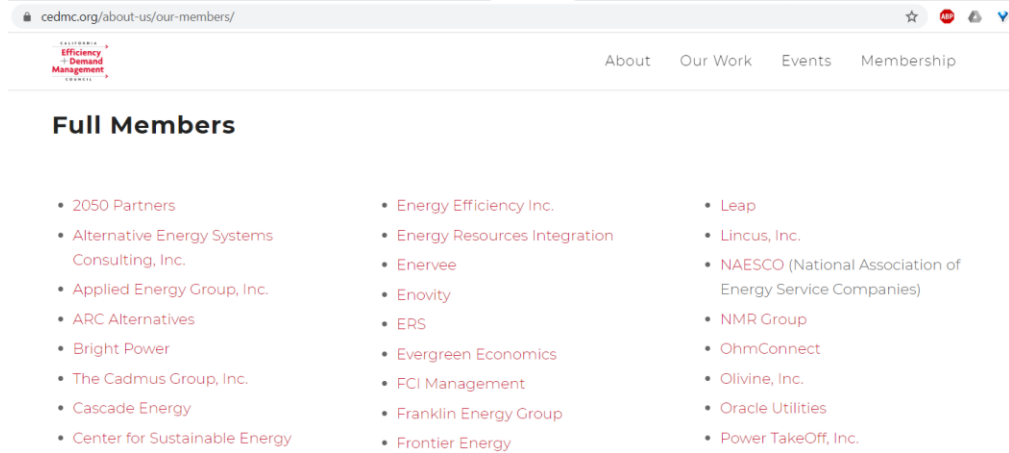
Power TakeOff, in Association With ComEd, Wins the MEEA Inspiring Efficiency Award for Innovation

CISION PR Newswire January 15, 2020

DENVER, Jan. 15, 2020 /PRNewswire/ -- The [Midwest Energy Efficiency Alliance](#) (MEEA) has awarded its 2020 Inspiring Efficiency Innovation Award to ComEd. As the program creator and manager, [Power TakeOff](#) first launched the [Virtual Commissioning \(VCx™\)](#) Program in ComEd's Illinois service territory starting in 2016. At no cost to participants, the VCx™ Program helps SMBs and public

3. CEDMC (California Efficiency and Demand Management Council)

- <https://cedmc.org/about-us/our-members/>

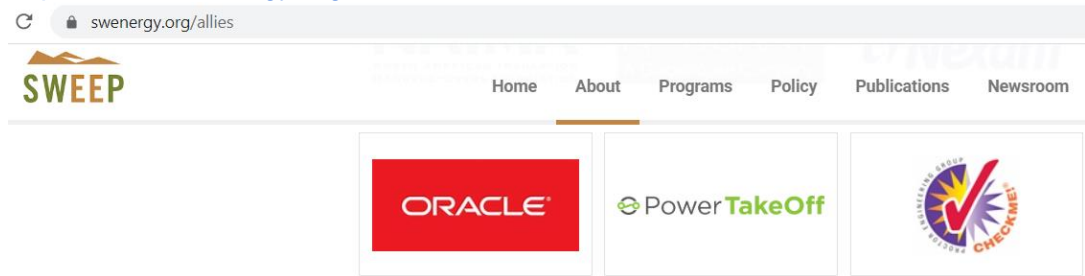


The screenshot shows the website for the California Efficiency and Demand Management Council (CEDMC). The page is titled "Full Members" and lists 18 member organizations in three columns:

- 2050 Partners
- Alternative Energy Systems Consulting, Inc.
- Applied Energy Group, Inc.
- ARC Alternatives
- Bright Power
- The Cadmus Group, Inc.
- Cascade Energy
- Center for Sustainable Energy
- Energy Efficiency Inc.
- Energy Resources Integration
- Enervee
- Enovity
- ERS
- Evergreen Economics
- FCI Management
- Franklin Energy Group
- Frontier Energy
- Leap
- Lincus, Inc.
- NAESCO (National Association of Energy Service Companies)
- NMR Group
- OhmConnect
- Olivine, Inc.
- Oracle Utilities
- Power TakeOff, Inc.

4. SWEEP

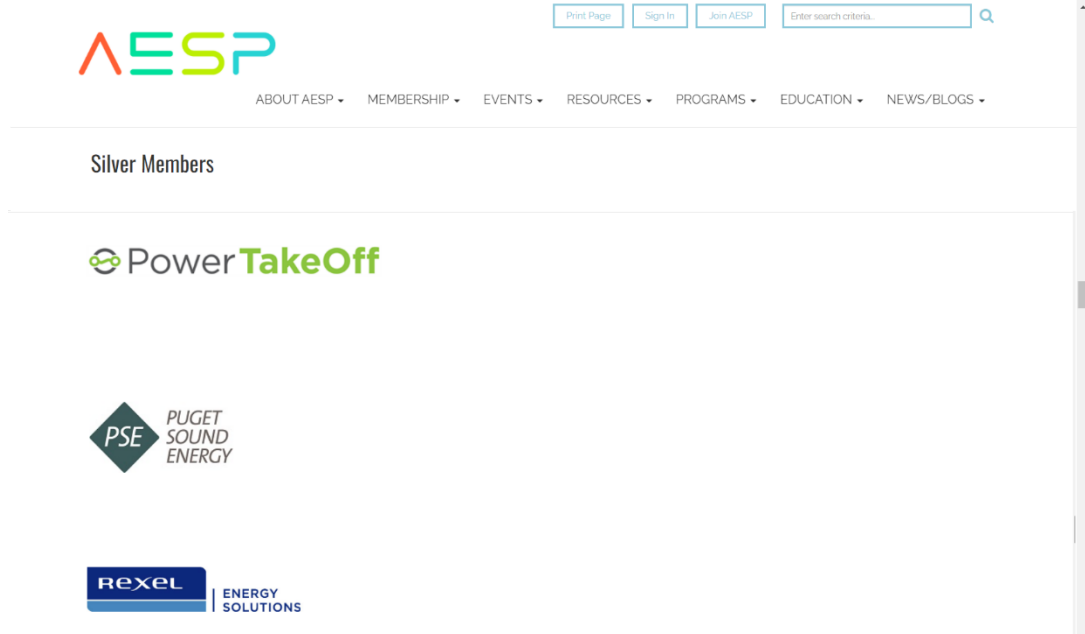
- <https://www.swenergy.org/allies>



The screenshot shows the website for SWEEP (Southwest Energy Efficiency Project). The page features the SWEEP logo and a navigation menu with links to Home, About, Programs, Policy, Publications, and Newsroom. Below the navigation menu, there are three logos displayed in a row: Oracle, PowerTakeOff, and a circular logo with a checkmark and the text "CHECK ME!".

5. AESP (Association of Energy Services Professionals)

- <https://www.aesp.org/page/aespgroupmembers>



The screenshot shows the website for the Association of Energy Services Professionals (AESP). The page features the AESP logo and a navigation menu with links to ABOUT AESP, MEMBERSHIP, EVENTS, RESOURCES, PROGRAMS, EDUCATION, and NEWS/BLOGS. Below the navigation menu, there is a section titled "Silver Members" which displays logos for PowerTakeOff, PSE (Puget Sound Energy), and Rexel Energy Solutions.

NAMES OF CURRENT CLIENTS

Below is a list of current utility clients with a description of the types of services provided by Power TakeOff and date of first work with the utility.

1. Xcel Energy – 2008 to present
 - Power TakeOff provides Xcel Energy with data analytics services and Energy Intelligence Software (EIS) services and support.
2. ComEd – 2016 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™) energy efficiency services under the DSM portfolio.
3. Ameren IL – 2020 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™) energy efficiency services under the DSM portfolio.
4. DTE Energy – 2020 to present
 - Power TakeOff implements a Virtual Commissioning™ (VCx™) pilot program under the DSM portfolio.
5. Ft. Collins Utilities – 2020 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™) energy efficiency services under the DSM portfolio.
6. United Illuminating – 2020 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™), data analytics, and energy efficiency reporting services under the DSM portfolio.
7. Puget Sound Energy – 2020 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™) energy efficiency services under the DSM portfolio.
8. Georgia Power – 2021 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™) energy efficiency services under the DSM portfolio.
9. MN Power – 2021 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™) energy efficiency services under the DSM portfolio.
10. Delmarva Power – 2021 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™) energy efficiency services under the DSM portfolio.
11. Pepco – 2021 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™) energy efficiency services under the DSM portfolio.
12. Duquesne Light Company – 2021 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™) energy efficiency services under the DSM portfolio.
13. Baltimore Gas & Electric – 2021 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™) energy efficiency services under the DSM portfolio.
14. Consolidated Edison – 2022 to present
 - Power TakeOff implements Virtual Commissioning™ (VCx™) energy efficiency services under the DSM portfolio.
15. Washington Gas – 2021 to present

EXHIBIT E – INSURANCE COVERAGE



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
05/07/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER USI INSURANCE SERVICES LLC/PHS 34341438 The Hartford Business Service Center 3600 Wiseman Blvd San Antonio, TX 78251	CONTACT NAME: PHONE (866) 467-8730 (A/C, No, Ext):		FAX (888) 443-6112 (A/C, No):
	E-MAIL ADDRESS:		
		INSURER(S) AFFORDING COVERAGE	NAIC#
INSURED POWER TAKEOFF, INC. POWER TAKEOFF CANADA INC. 1750 30TH ST # 420 BOULDER CO 80301-1029	INSURER A : Hartford Casualty Insurance Company		29424
	INSURER B : Hartford Fire and Its P&C Affiliates		00914
	INSURER C :		
	INSURER D :		
	INSURER E :		
	INSURER F :		

COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/Y YYYY)	LIMITS	
A	<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> General Liability			34 SBA PR5728	06/05/2022	06/05/2023	EACH OCCURRENCE	\$2,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$300,000
							MED EXP (Any one person)	\$10,000
							PERSONAL & ADV INJURY	\$2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						GENERAL AGGREGATE	\$4,000,000
							PRODUCTS - COMP/OP AGG	\$4,000,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			34 SBA PR5728	06/05/2022	06/05/2023	COMBINED SINGLE LIMIT (Ea accident)	\$2,000,000
							BODILY INJURY (Per person)	
							BODILY INJURY (Per accident)	
							PROPERTY DAMAGE (Per accident)	
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE			34 SBA PR5728	06/05/2022	06/05/2023	EACH OCCURRENCE	\$4,000,000
	<input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 10,000						AGGREGATE	\$4,000,000
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			34 WEC LW2293	09/11/2021	09/11/2022	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER	
							E.L. EACH ACCIDENT	\$1,000,000
							E.L. DISEASE - EA EMPLOYEE	\$1,000,000
							E.L. DISEASE - POLICY LIMIT	\$1,000,000
A	FAILSAFE TECHNOLOGY E OR O			34 SBA PR5728	06/05/2022	06/05/2023	Each Glitch Aggregate	\$5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Those usual to the Insured's Operations.

CERTIFICATE HOLDER

For Informational Purposes
 1750 30TH ST # 420
 BOULDER CO 80301-1029

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Susan L. Castaneda

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