



March 29, 2023

Subject: Pennsylvania Application for Natural Gas Broker Services

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Dear Sir/Madame,

Please find enclosed a signed and notarized application including all required NON-CONFIDENTIAL documentation on behalf of my company Affinity Energy Management, LLC.

We are filing all CONFIDENTIAL attachments under a separate sealed cover.

Thank you for your prompt attention to this application and please let us know if you have any questions or need anything else from us.

Sincerely,

Edward C. Jackson

Edward C. Jackson
Principal

Affinity Energy Management, LLC
220 Cherry Blossom Place
Hockessin, DE 19707
303-218-8920
Fax 866-480-7811
ed@affinityenergy.net

BEFORE THE PENNSYLVANIA PUBLIC UTILITY COMMISSION

Application of Affinity Energy Management, LLC, for approval to offer, render, furnish, or supply natural gas supply services as a(n) broker/marketer to the public in the Commonwealth of Pennsylvania (Pennsylvania).

To the Pennsylvania Public Utility Commission:

1. IDENTIFICATION AND CONTACT INFORMATION

- a. **IDENTITY OF THE APPLICANT:** Provide name (*including any fictitious name or d/b/a*), primary address, web address, and telephone number of Applicant:

Affinity Energy Management, LLC
Edward C. Jackson
220 Cherry Blossom Place
Hockessin, DE 19707
www.affinityenergy.net
1-800-494-1709

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APR 7 2023 AM 10:33

- b. **PENNSYLVANIA ADDRESS / REGISTERED AGENT:** If the Applicant maintains a primary address outside of Pennsylvania, provide the name, address, telephone number, and fax number of the Applicant's secondary office within Pennsylvania. If the Applicant does not maintain a physical location within Pennsylvania, provide the name, address, telephone number, and fax number of the Applicant's Registered Agent within Pennsylvania.

Registered Agent:
Kerr Law Associates, P.C.
2 Penn Center
1500 JFK Blvd, Suite 1040
Philadelphia, PA 19102
Phone: 215-772-1200
Fax: 267-200-0265

- c. **REGULATORY CONTACT:** Provide the name, title, address, telephone number, fax number, and e-mail address of the person to whom questions about this Application and future inquiries should be addressed.

NOTE: To ensure timely receipt of regulatory information, a contact employed directly by the Applicant, and not a consultant, is preferred.

Chad Jackson
Energy Consultant
220 Cherry Blossom Place
Hockessin, DE 19707
Cell: 302-593-7545
Fax: 1-866-480-7811
chad@affinityenergy.net

- d. **ATTORNEY:** Provide the name, address, telephone number, fax number, and e-mail address of the Applicant's attorney. If the Applicant is not using an attorney, explicitly state so.

Joseph A. Giordano, Esq.
Giordano, DelCollo, Werb & Gagne, LLC
5315 Limestone Road
Wilmington, DE 19808
Phone: 302-234-6855
Fax: 302-234-6876

- e. **CONTACTS FOR CONSUMER SERVICE AND COMPLAINTS:** Provide the name, title, address, telephone number, fax number, and e-mail **OF THE PERSON AND AN ALTERNATE PERSON (2 REQUIRED)** responsible for addressing customer complaints. These persons will ordinarily be the initial point(s) of contact for resolving complaints filed with the Applicant, the Natural Gas Distribution Company, the Pennsylvania Public Utility Commission, or other agencies. The main contact's information will be listed on the Commission website list of licensed NGSs.

Chad Jackson
Energy Consultant
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Fax: 1-866-480-7811
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2. **BUSINESS ENTITY FILINGS AND REGISTRATION**

- a. **FICTITIOUS NAME:** *(Select appropriate statement and provide supporting documentation as listed.)*

The Applicant will be using a fictitious name or doing business as ("d/b/a")

Provide a copy of the Applicant's filing with Pennsylvania's Department of State Pursuant to 54 Pa. C.S. §311.

Or

The Applicant will not be using a fictitious name.

- b. **BUSINESS ENTITY AND DEPARTMENT OF STATE FILINGS:**
(Select appropriate statement and provide supporting documentation. As well, understand that Domestic means being formed within Pennsylvania and foreign means being formed outside Pennsylvania.)

The Applicant is a sole proprietor.

- If the Applicant is located outside the Commonwealth, provide proof of compliance with 15 Pa. C.S. §4124 relating to Department of State filing requirements.

Or

The Applicant is a:

domestic general partnership (*)

- domestic limited partnership (15 Pa. C.S. §8511)
- foreign general or limited partnership (15 Pa. C.S. §4124)
- domestic limited liability partnership (15 Pa. C.S. §8201)
- foreign limited liability general partnership (15 Pa. C.S. §8211)
- foreign limited liability limited partnership (15 Pa. C.S. §8211)

- Provide proof of compliance with appropriate Department of State filing requirements as indicated above.
- Give name, d/b/a, and address of partners. If any partner is not an individual, identify the business nature of the partner entity and identify its partners or officers.
- Provide the state in which the business is organized/formed and provide a copy of the Applicant's charter documentation.
- * If a corporate partner in the Applicant's domestic partnership is not domiciled in Pennsylvania, attach a copy of the Applicant's Department of State filing pursuant to 15 Pa. C.S. §4124.

or

X The Applicant is a:

- domestic corporation (15 Pa. C.S. §1308)
- foreign corporation (15 Pa. C.S. §4124)
- domestic limited liability company (15 Pa. C.S. §8913)
- foreign limited liability company (15 Pa. C.S. §8981)
- Other (Describe):

- Provide proof of compliance with appropriate Department of State filing requirements as indicated above. **See attachment 1.**
- Provide the state in which the business is incorporated/organized/formed and provide a copy of the Applicant's charter documentation. **Delaware – see attachment 2.**
- Give name and address of officers.

Edward Jackson
Principal
220 Cherry Blossom Place
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3. AFFILIATES AND PREDECESSORS

(both in state and out of state)

- a. **AFFILIATES:** Give name and address of any affiliate(s) currently doing business and state whether the affiliate(s) are jurisdictional public utilities. If the Applicant does not have any affiliates doing business, explicitly state so. Also, state whether the applicant has any affiliates that are currently applying to do business in Pennsylvania.

Affinity Energy Management has no affiliates of any kind.

- b. **PREDECESSORS:** Identify the predecessor(s) of the Applicant and provide the name(s) under which the Applicant has operated within the preceding five (5) years, including address, web address, and telephone number, if applicable. If the Applicant does not have any predecessors that have done business, explicitly state so.

Affinity Energy Management has no predecessors of any kind.

4. OPERATIONS

- a. **APPLICANT'S PRESENT OPERATIONS:** (select and complete the appropriate statement)

Definitions

- Supplier – an entity which provides natural gas supply services to retail gas customers utilizing the jurisdictional facilities of a natural gas distribution company
- Broker/Marketer - an entity that acts as an intermediary in the sale and purchase of natural gas but does not take title to the natural gas.

The Applicant is presently doing business in Pennsylvania as a

- natural gas interstate pipeline
- municipality providing service outside its municipal limits
- local gas distribution company
- retail supplier of natural gas services in the Commonwealth
- a natural gas producer
- a broker/marketer engaged in the business of supplying natural gas services
- Other. (Identify the nature of service being rendered)

A broker/marketer engaged in the business of supplying electricity services.

OR

The Applicant is not presently doing business in Pennsylvania.

- b. **APPLICANT'S PROPOSED OPERATIONS:** The Applicant proposes to operate as a:

- Supplier or Aggregator of natural gas services
- Municipal supplier of natural gas services
- Cooperative supplier of natural gas services
- Broker/Marketer engaged in the business of supplying natural gas services

Check here to verify that your organization will not be taking title to the natural gas nor will you be making payments for customers.

Other (Describe):

c. PROPOSED SERVICES: Describe in detail the natural gas supply services which the Applicant proposes to offer.

Natural gas procurement broker / consultant working with mostly commercial and industrial customers to negotiate energy contracts on their behalf.

d. PROPOSED SERVICE AREA: Check the box of each Natural Gas Distribution Company for which the Applicant proposes to provide service.

- | | |
|---|---|
| <input type="checkbox"/> Columbia | <input type="checkbox"/> Philadelphia Gas Works |
| <input type="checkbox"/> National Fuel Gas | <input type="checkbox"/> UGI Utilities – Gas Division |
| <input type="checkbox"/> PECO | <input type="checkbox"/> Valley Energy |
| <input type="checkbox"/> Peoples Natural Gas Company - Peoples Natural Gas Division | |
| <input type="checkbox"/> Peoples Natural Gas Company - Peoples Gas Division | |

All of the above

e. CUSTOMERS: Applicant proposes to provide services to:

- Residential Customers
 Small Commercial Customers - (Less than 6,000 Mcf annually)
 Large Commercial Customers - (6,000 Mcf or more annually)
 Industrial Customers
 Governmental Customers
 All of above
 Other (Describe):
 Residential and Small Commercial Customers in a Mixed Meter Capacity -
This customer class reflects situations in which a large commercial, industrial, and/or governmental customer account also contains features of residential and/or small commercial customers. In this instance, the residential and/or small commercial portion must be an incidental portion of the larger account. **This customer class alone does not allow marketing targeted directly to residential and/or small commercial customers.** Further information may be found in the Requirements Applicable to Mixed Meter Scenarios Secretarial Letter served March 25, 2011, at Docket No. M-2009-2082042.

f. START DATE: Provide the approximate date the Applicant proposes to actively market within the Commonwealth.

May 1, 2023

5. COMPLIANCE

a. CRIMINAL/CIVIL PROCEEDINGS: State specifically whether the Applicant, an affiliate, a predecessor of either, or a person identified in this Application, has been or is currently the defendant of a criminal or civil proceeding within the last five (5) years.

Not applicable.

Identify all such proceedings (active or closed), by name, subject and citation; whether before an administrative body or in a judicial forum. If the Applicant has no proceedings to list, explicitly state such.

Not applicable.

- b. **SUMMARY:** If applicable; provide a statement as to the resolution or present status of any such proceedings listed above.

Not applicable.

- c. **CUSTOMER/REGULATORY/PROSECUTORY ACTIONS:** Identify all formal or escalated actions or complaints filed with or by a customer, regulatory agency, or prosecutory agency against the Applicant, an affiliate, a predecessor of either, or a person identified in this Application, for the prior five (5) years, including but not limited to customers, Utility Commissions, and Consumer Protection Agencies such as the Offices of Attorney General. **Applicant should also include if it had a Pennsylvania PUC EGS or NGS license previously cancelled by the Commission.** If the Applicant has no actions or complaints to list, explicitly state such.

Not applicable, no customer/regulatory/prosecutor actions in any state in the last 5 years.

- d. **SUMMARY:** If applicable; provide a statement as to the resolution or present status of any actions listed above.

Not applicable.

6. PROOF OF SERVICE

***Required of ALL Applicants regardless of operating as a supplier, broker, marketer, or aggregator.
(Example Certificate of Service is attached at Appendix C)***

- a.) **STATUTORY AGENCIES:** Pursuant to Section 5.14 of the Commission's Regulations, 52 Pa. Code §5.14, provide proof of service of a signed and verified Application with attachments on the following:

Office of Consumer Advocate
5th Floor, Forum Place
555 Walnut Street
Harrisburg, PA 17120

**Office of the Attorney General
Bureau of Consumer Protection**
Strawberry Square, 14th Floor
Harrisburg, PA 17120

Office of the Small Business Advocate
Commerce Building, Suite 202
300 North Second Street
Harrisburg, PA 17101

**Department of Revenue
Bureau of Compliance**
PO Box 281230
Harrisburg, PA 17128-1230

**Pennsylvania Public Utility Commission
Bureau of Investigation & Enforcement**
Commonwealth Keystone Building
400 North Street, 2 West
Harrisburg, PA 17120

- b.) **NGDCs:** Pursuant to Sections 1.57 and 1.58 of the Commission's Regulations, 52 Pa. Code §§1.57 and 1.58, provide Proof of Service of the Application and attachments upon each of the Natural Gas Distribution

Companies the Applicant proposed to provide service in. Upon review of the Application, further notice may be required pursuant to Section 5.14 of the Commission's Regulations, 52 Pa. Code §5.14. Contact information for each NGDC is as follows.

See attachment 3 for utility bonding letters.

<p>Columbia Gas of PA, Inc. Transport Support Services 290 W. Nationwide Blvd. Columbus, OH 43215 PH: 614.460.4980 e-mail: transportevaluations@nisource.com</p>	<p>National Fuel Gas Distribution Corp. Daniel Czechowicz, Director – Gas Supply Administration 6363 Main Street Williamsville, NY 14221 PH: 716.857.6917 e-mail: czechowiczd@natfuel.com</p>
<p>Peoples Natural Gas Company LLC – Peoples Natural Gas Division Carol Scanlon 375 North Shore Drive Pittsburgh, PA 15212 PH: 412.208.6931 FAX: 412.208.6577 e-mail: Carol.Scanlon@peoples-gas.com</p>	<p>Peoples Natural Gas Company LLC – Peoples Gas Division Carol Scanlon 375 North Shore Drive Pittsburgh, PA 15212 PH: 412.208.6931 FAX: 412.208.6577 e-mail: Carol.Scanlon@peoples-gas.com</p>
<p>PECO Suzette Adams, Sr. Manager, Gas Supply and Transportation 2301 Market Street, S-18 Philadelphia, PA 19103 PH: 215.841.6467 Email: Suzette.Adams@exeloncorp.com</p>	<p>Philadelphia Gas Works Ryan Reeves, Director Supply Transportation & Control 800 West Montgomery Avenue Philadelphia, PA 19122 PH: 215.787.5103 email: pgwchoicesupply@pgworks.com</p>
<p>UGI Utilities, Inc. – Gas Division Sherry Epler 1 UGI Drive Denver, PA 17517 PH: 610.796.3447 Email: sepler@ugi.com</p>	<p>Valley Energy Inc. Ed Rogers 523 South Keystone Avenue Sayre, PA 18840-0340 PH: 570.888-9664 FAX: 570.888.6199 email: erogers@ctenterprises.org</p>

7. FINANCIAL FITNESS

- a. **BONDING:** In accordance with 66 Pa. C.S. Section 2208(c), no natural gas supplier license shall be issued or remain in force unless the applicant or holder furnishes a bond or other security in a form and amount to ensure the financial responsibility of the natural gas supplier. The criteria used to determine the amount and form of such bond or other security shall be set by each NGDC. Provide documentation that the applicant has met the security requirement of each NGDC by submitting the letters sent by the NGDCs stating what bonding amounts they require. The contact information is located in Section 6.b.

Not applicable due to only applying to be a broker, not a supplier. We will not take title to any natural gas.

- b. **FINANCIAL RECORDS, STATEMENTS, AND RATINGS:** Applicant must provide sufficient information to demonstrate financial fitness commensurate with the service proposed to be provided. Examples of such information which may be submitted include the following:

- Actual (or proposed) organizational structure including parent, affiliated or subsidiary companies.
- Published Applicant or parent company financial and credit information (i.e. 10Q or 10K). (SEC/EDGAR web addresses are sufficient)
- Applicant's accounting statements, including balance sheet and income statements for the past two years.

CONFIDENTIAL – see attachment 4 balance sheets and P&L statements.

- Evidence of Applicant's credit rating. Applicant may provide a copy of its Dun and Bradstreet Credit Report and Robert Morris and Associates financial form, evidence of Moody's, S&P, or Fitch ratings, and/or other independent financial service reports.

Affinity Energy Management – DUNS# 62-382-6737

- A description of the types and amounts of insurance carried by Applicant which are specifically intended to provide for or support its financial fitness to perform its obligations as a licensee.

Commercial General Liability - \$1,000,000 each occurrence; \$2,000,000 general agg.
Excess/Umbrella Liability - \$2,000,000
Errors & Omissions - \$1,000,000 each claim, \$3,000,000 annual agg.

- Audited financial statements exhibiting accounts over a minimum two year period.
- Bank account statement, tax returns from the previous two years, or any other information that demonstrates Applicant's financial fitness.

CONFIDENTIAL – see attachment 5 Schedule C from previous two years tax filing.

- c. **SUPPLIER FUNDING METHOD:** If Applicant is operating as anything other than **Broker/Marketer only**, explain how Applicant will fund its operations. Provide all credit agreements, lines of credit, etc., and elaborate on how much is available on each item.

Not applicable – operating as a broker.

- d. **BROKER PAYMENT STRUCTURE:** If applicant is a broker/marketer, explain how your organization will be collecting your fees.

We will be collecting our fees from each winning natural gas supplier. Fees will be paid out to us monthly as on-flow gas payments.

- e. **ACCOUNTING RECORDS CUSTODIAN:** Provide the name, title, address, telephone number, FAX number, and e-mail address of Applicant's custodian for its accounting records.

Chad Jackson
Energy Consultant
220 Cherry Blossom Place
Hockessin, DE 19707
Cell: 302-593-7545
Fax: 1-866-480-7811
chad@affinityenergy.net

- f. **TAXATION:** Complete the TAX CERTIFICATION STATEMENT attached as Appendix D to this application.

All sections of the Tax Certification Statement must be completed. Submitting N/A on either the Sales Tax License Number or the Employer ID Number (items 7A and 7B) shall be accompanied by supporting documentation or an explanation validating the absence of such information.

Items 7A and 7C on the Tax Certification Statement are designated by the Pennsylvania Department of Revenue. Item 7B on the Tax Certification Statement is designated by the Internal Revenue Service.

CONFIDENTIAL - see attached Appendix D.

8. TECHNICAL FITNESS:

To ensure that the present quality and availability of service provided by natural gas distribution companies does not deteriorate, the Applicant shall provide sufficient information to demonstrate technical fitness commensurate with the service proposed to be provided.

- a. **EXPERIENCE, PLAN, STRUCTURE:** such information may include:

- Applicant's previous experience in the natural gas industry.

Ed Jackson, principal of the Affinity Energy Management, worked 18 years at an electric and gas utility in DE, Delmarva Power.

- Summary and proof of licenses as a supplier of natural gas services in other states or jurisdictions.

**DE Broker License PSC Docket # 10-408, Order # 7876
MD Natural Gas Broker License IR-2014**

- Type of customers and number of customers Applicant currently serves in other jurisdictions.

Small, medium, and large commercial and industrial customers including the State of DE which is approximately 700,000 Dths / year across hundreds of accounts.

- Staffing structure and numbers as well as employee training commitments.
- Business plans for operations within the Commonwealth.
- Any other information appropriate to ensure the technical capabilities of the Applicant.

- b. **PROPOSED MARKETING METHOD** (check all that apply)

- Internal – Applicant will use its own internal resources/employees for marketing
- External NGS – Applicant will contract with a **PUC LICENSED NGS**
- Affiliate – Applicant will use a **NON-NGS affiliate that is a nontraditional marketer and/or marketing services consultant**
- External Third-Party – Applicant will contract with a **NON-NGS third party nontraditional marketer and/or non-selling marketer**
- Other (Describe):

c. **DOOR TO DOOR SALES:** Will the Applicant be implementing door to door sales activities?

- Yes
- No

If yes, will the Applicant be using verification procedures?
Not applicable.

- Yes
- No

If yes, describe the Applicant's verification procedures.
Not applicable.

d. **OVERSIGHT OF MARKETING:** Explain all methods Applicant will use to ensure all marketing is performed in an ethical manner, for both employees and subcontractors.

Affinity Energy Management markets itself through networking events such as IFMA, BOMA, GPAEE, Philadelphia Chamber of Commerce, etc. Affinity may also market itself on social media platforms such as LinkedIn.

e. **OFFICERS:** Identify Applicant's chief officers, and include the professional resumes for any officers directly responsible for operations. All resumes should include date ranges and job descriptions containing actual work experience.

**See attachment 6 resume for Edward C. Jackson – Principal.
 See attachment 7 resume for Charles G. Jackson – Energy Consultant.**

9. DISCLOSURE STATEMENT:

(Not applicable for an applicant applying for a license exclusively as a broker/marketer.)

DISCLOSURE STATEMENTS: If proposing to serve Residential and/or Small Commercial (less than 6,000 Mcf annually) Customers, provide a Residential and/or Small Commercial disclosure statement. A sample disclosure statement is provided as Appendix E to this Application.

- Natural gas should be priced in clearly stated terms to the extent possible. Common definitions should be used. All consumer contracts or sales agreements should be written in plain language with any exclusions, exceptions, add-ons, package offers, limited time offers or other deadlines prominently communicated. Penalties and procedures for ending contracts should be clearly communicated.

Not applicable as only applying to be a broker.

10. VERIFICATIONS, ACKNOWLEDGEMENTS, AND AGREEMENTS

a. **STANDARDS OF CONDUCT AND DISCLOSURE:** As a condition of receiving a license, Applicant agrees to conform to any Uniform Standards of Conduct and Disclosure as set forth by the Commission. Further, the Applicant agrees that it must comply with and ensure that its employees, agents, representatives, and independent contractors comply with the standards of conduct and disclosure set out in Commission regulations at 52 Pa. Code § 62.114.

AGREED

- b. **REPORTING REQUIREMENTS:** Applicant agrees to provide the following information to the Commission:
- Reports of Gross Receipts: Applicant shall file an annual report with the Commission on an annual basis no later than April 30th following the end of the calendar year per 52 Pa. Code § 62.110.

AGREED

- c. **TRANSFER OF LICENSE:** The Applicant understands that if it plans to transfer its license to another entity, it is required to request authority from the Commission for permission prior to transferring the license. See 66 Pa. C.S. § 2208(d). Transferee will be required to file the appropriate licensing application.

AGREED

- d. **ANNUAL FEES:** The Public Utility Code authorizes the PUC to collect an annual fee of \$350 from suppliers, brokers, marketers, and aggregators selling natural gas in the Commonwealth of PA, and a supplemental fee based on annual gross intrastate revenues, applicable to suppliers only.

ACKNOWLEDGED

- e. **FURTHER DEVELOPMENTS:** Applicant is under a continuing obligation to amend its application if substantial changes occur to the information upon which the Commission relied in approving the original filing. See 52 Pa. Code § 62.105.

AGREED

- f. **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.

AGREED

- g. **NOTIFICATION OF CHANGE:** If your answer to any of these items changes during the pendency of your application or if the information relative to any item herein changes while you are operating within the Commonwealth of Pennsylvania, you are under a duty to so inform the Commission, within thirty (30) days, as to the specifics of any changes which have a significant impact on the conduct of business in Pennsylvania. See 52 Pa. Code § 62.105.

AGREED

- h. **CEASING OF OPERATIONS:** Applicant is also required to officially notify the Commission if it plans to cease doing business in Pennsylvania, 90 days prior to ceasing operations.

AGREED

- i. **FILING FEE:** The Applicant has enclosed or paid the required, non-refundable filing fee by CERTIFIED CHECK OR MONEY ORDER in the amount of \$350.00 payable to the Commonwealth of Pennsylvania. The Commission does not accept corporate or personal checks for filing fees.

PAYMENT ENCLOSED

11. AFFIDAVITS
(All affidavits must be notarized before filing.)

- a.) **APPLICATION AFFIDAVIT:** Complete and submit with your filing an officially notarized Application Affidavit stating that all the information submitted in this application is truthful and correct. An example copy of this Affidavit can be found at Appendix A.

See attached Appendix A.

- b.) **OPERATIONS AFFIDAVIT:** Provide an officially notarized affidavit stating that you will adhere to the Public Utility Code of Pennsylvania and applicable federal and state laws. An example copy of this Affidavit can be found at Appendix B.

See attached Appendix B.

12. NEWSPAPER PUBLICATIONS

Required of ALL Applicants regardless of operating as a supplier, broker, marketer, or aggregator.

Notice of filing of this Application must be published in newspapers of general circulation covering each county in which the applicant intends to provide service. The newspapers in which proof of publication are required is dependent on the service territories the applicant is proposing to serve.

The chart below dictates which newspapers are necessary for each NGDC. For example, an applicant that wants to operate in Peoples Natural Gas - Peoples Natural Gas Division would need to run ads in The Erie Times-News, the Pittsburgh Post-Gazette, and the Johnstown Tribune-Democrat. If the applicant is proposing to serve the entire Commonwealth, please file proof of publication in all seven newspapers.

The only acceptable verification of this requirement is with Notarized Proofs of Publication, which may be requested from each newspaper and must be supplied with this application. Applicants do not need a docket number in their publication. Docket numbers will be issued when all criteria on the item 14 checklist (see below) are satisfied.

	Erie Times-News	Harrisburg Patriot-News	Philadelphia Daily News or Philadelphia Inquirer	Pittsburgh Post-Gazette	Scranton Times-Tribune	Williamsport Sun-Gazette	Johnstown Tribune-Democrat
Columbia Gas	X	X		X		X	X
National Fuel Gas	X			X			
PECO			X				
Peoples Natural Gas – Peoples Natural Gas Division	X			X			X
Peoples Natural Gas – Peoples Gas Division				X			
Philadelphia Gas Works			X				
UGI Utilities – Gas Div.	X	X	X	X	X	X	X
Valley Energy					X	X	
Entire Commonwealth	X	X	X	X	X	X	X

(Newspaper Publication Templates are provided at Appendices F and G)

13. SIGNATURE

Applicant: Edward C. Jackson

By: *Edward C. Jackson*

Title: Principal

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APR 7 2023 AM 10:33

14. CHECKLIST

For the applicant's convenience, please use the following checklist to ensure all relevant sections are complete. The Commission Secretary's Bureau will not accept an application unless each of the following sections is complete.

Applicant: Affinity Energy Management, LLC

x	Signature	
x	Filing Fee (ONLY CERTIFIED CHECK OR MONEY ORDER)	
x	Application Affidavit	
x	Operations Affidavit	
x	Proof of Publication	
X	Tax Certification Statement	
X	Commonwealth Department of State Verification	
X	Certificate of Service	

Applicant's Use

PUC Secretary's Bureau Use

Appendix A

APPLICATION AFFIDAVIT

State of Delaware :

ss.

RCVD PUC SEC BUR
APR 7 2023 AM 10:53

County of New Castle :

Edward C. Jackson, Affiant, being duly [sworn/affirmed] according to law, deposes and says that:

[He/she is the Principal (Office of Affiant) of Affinity Energy Management, LLC (Name of Applicant);]

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

That the Applicant herein Edward C. Jackson, has the burden of producing information and supporting documentation demonstrating its technical and financial fitness to be licensed as a natural gas supplier pursuant to 66 Pa. C.S. § 2208 (c)(1).

That the Applicant herein Edward C. Jackson, has answered the questions on the application correctly, truthfully, and completely and provided supporting documentation as required.

That the Applicant herein Edward C. Jackson, 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 Edward C. Jackson, 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.


Signature of Affiant

Sworn and subscribed before me this 15th day of March, 2023.


Signature of official administering oath

My commission expires _____ CINDY ELLEN TIMKO
NOTARY PUBLIC
STATE OF DELAWARE
My Commission Expires 10-02-2024

Appendix B

OPERATIONS AFFIDAVIT

State of Delaware :
:
County of New Castle :

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APR 7 2023 PM 10:33

ss.

Edward C. Jackson, Affiant, being duly [sworn/affirmed] according to law, deposes and says that:

[He/she is the Principal (Office of Affiant) of Affinity Energy Management, LLC (Name of Applicant);]

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

That Edward C. Jackson, the Applicant herein, acknowledges that [Applicant] may have obligations pursuant to this Application consistent with the Public Utility Code of the Commonwealth of Pennsylvania, Title 66 of the Pennsylvania Consolidated Statutes; or with other applicable statutes or regulations including Emergency Orders which may be issued verbally or in writing during any emergency situations that may unexpectedly develop from time to time in the course of doing business in Pennsylvania.

That Edward C. Jackson, the Applicant herein, asserts that [he/she/it] possesses the requisite technical, managerial, and financial fitness to render natural gas supply service within the Commonwealth of Pennsylvania and that the Applicant will abide by all applicable federal and state laws and regulations and by the decisions of the Pennsylvania Public Utility Commission.

That Edward C. Jackson, the Applicant herein, certifies to the Commission that it is subject to, will pay, and in the past has paid, the full amount of taxes imposed by Articles II and XI of the Act of March 4, 1971 (P.L. 6, No. 2), known as the Tax Reform Act of 1971 and any tax imposed by Chapter 22 of Title 66. The Applicant acknowledges that failure to pay such taxes or otherwise comply with the taxation requirements of Chapter 28 shall be cause for the Commission to revoke the license of the Applicant. The Applicant acknowledges that it shall report to the Commission its jurisdictional natural gas sales for ultimate consumption, for the previous year or as otherwise required by the Commission. The Applicant also acknowledges that it is subject to 66 Pa. C.S. §506 (relating to the inspection of facilities and records).

Applicant, by filing of this application waives confidentiality with respect to its state tax information in the possession of the Department of Revenue, regardless of the source of the information, and shall consent to the Department of Revenue providing that information to the Pennsylvania Public Utility Commission.

Appendix B (Continued)

That Edward C. Jackson, the Applicant herein, acknowledges that it has a statutory obligation to conform with 66 Pa. C.S. §506 and the standards and billing practices of 52 PA. Code Chapter 56.

That the Applicant agrees to provide all consumer education materials and information in a timely manner as requested by the Office of Communications or other Commission bureaus. Materials and information requested may be analyzed by the Commission to meet obligations under applicable sections of the law.

That the facts above set forth are true and correct/true and correct to the best of his/her knowledge, information, and belief.



Signature of Affiant

Sworn and subscribed before me this 15th day of March, 2023.



Signature of official administering oath

My commission expires _____
CINDY ELLEN TIMKO
NOTARY PUBLIC
STATE OF DELAWARE
My Commission Expires 10-02-2024

Appendix C

Required of ALL Applicants regardless of operating as a supplier, broker, marketer, or aggregator.

CERTIFICATE OF SERVICE TEMPLATE

On this the __16th__ day of __March____ 2023, I certify that a true and correct copy of the foregoing application form for licensing within the Commonwealth of Pennsylvania as a Natural Gas Supplier and all **NON-CONFIDENTIAL** attachments have been served, as either a hardcopy or a searchable PDF version on a cd-rom, upon the following:

Office of Consumer Advocate

5th Floor, Forum Place
555 Walnut Street
Harrisburg, PA 17120

Office of the Small Business Advocate

Commerce Building, Suite 202
300 North Second Street
Harrisburg, PA 17101

**Pennsylvania Public Utility Commission
Bureau of Investigation & Enforcement**

Commonwealth Keystone Building
400 North Street, 2 West
Harrisburg, PA 17120

National Fuel Gas Distribution Corp.

Daniel Czechowicz, Director – Gas Supply Administration
6363 Main Street
Williamsville, NY 14221
PH: 716.857.6917
e-mail: czechowiczd@natfuel.com

Peoples Natural Gas Company LLC - Peoples Natural Gas Division

Carol Scanlon
375 North Shore Drive
Pittsburgh, PA 15212
PH: 412.208.6931
e-mail: Carol.Scanlon@peoples-gas.com

Philadelphia Gas Works

Ryan Reeves, Director Supply Transportation & Control
800 West Montgomery Avenue
Philadelphia, PA 19122
PH: 215.787.5103
email: pgwchoicesupply@pgworks.com

Valley Energy Inc.

Ed Rogers
523 South Keystone Avenue
Sayre, PA 18840-0340
PH: 570.888-9664
email: erogers@ctenterprises.org

**Office of the Attorney General
Bureau of Consumer Protection**

Strawberry Square, 14th Floor
Harrisburg, PA 17120

**Department of Revenue
Bureau of Compliance**

PO Box 281230
Harrisburg, PA 17128-1230

RCVD PUC SEC BUR
APR 7 2023 AM 10:33

Columbia Gas of PA, Inc.

Transport Support Services
290 W. Nationwide Blvd.
Columbus, OH 43215
PH: 614.460.4980
e-mail: transportevaluations@nisource.com

PECO

Suzette Adams, Sr. Manager, Gas Supply and Transportation
2301 Market Street, S-18
Philadelphia, PA 19103
PH: 215.841.6467
Email: Suzette.Adams@exeloncorp.com

Peoples Natural Gas Company LLC - Peoples Gas Division

Carol Scanlon
375 North Shore Drive
Pittsburgh, PA 15212
PH: 412.208.6931
e-mail: Carol.Scanlon@peoples-gas.com

UGI Utilities, Inc. – Gas Division

Sherry Epler
1 UGI Drive
Denver, PA 17517
PH: 610.796.3447
Email: sepler@ugi.com

Edward C. Jackson

Edward C. Jackson, Principal
Affinity Energy Management, LLC

CONFIDENTIAL



Appendix D Tax Certification filed separately under confidential seal.

RCUD PUC SEC BUR
APR 7 2023 AM 10:33

Appendix F
NEWSPAPER PUBLICATION TEMPLATE FOR NGS ONLY

PENNSYLVANIA
PUBLIC UTILITY COMMISSION
NOTICE

Application of Affinity Energy Management, LLC For Approval To Offer, Render, or Furnish Natural Gas Services as a Marketer/Broker Engaged In The Business Of Supplying Natural Gas Supply Services, To The Public In The Commonwealth Of Pennsylvania.

Affinity Energy Management will be filing an application with the Pennsylvania Public Utility Commission (“PUC”) for a license to provide natural gas supply services as a broker/marketer engaged in the business of providing natural gas services. Affinity Energy Management proposes to sell natural gas and related services in the entire Commonwealth of PA under the provisions of the new Natural Gas Choice and Competition Act.

The PUC may consider this application without a hearing. Protests directed to the technical or financial fitness of Affinity Energy Management may be filed within 15 days of the date of this notice with the Secretary of the PUC, 400 North Street, Harrisburg, PA 17120. You should send copies of any protest to Affinity Energy Management’s attorney at the address listed below.

By and through Counsel: Joseph A. Giordano, Esq.
Giordano, DelCollo, Werb, & Gagne, LLC
5315 Limestone Road
Wilmington, DE 19808
302-234-6855
302-234-6876

LOCALiQ

Erie Times-News | The Intelligencer
Blacks County Courier Times
The Daily American | Beaver County Times
Pezono Record | Burlington County Times

PO Box 630531 Cincinnati, OH 45263-0531

PROOF OF PUBLICATION

Affinity Energy Management
220 Cherry Blossom Pl.
Hockessin DE 19707-2046

STATE OF PENNSYLVANIA, COUNTY OF ERIE

The Erie Times-News is a newspaper of general circulation, whose principal place of business is at 205 W 12th Street, Erie, Pennsylvania. That a copy of the printed notice, hereto attached, is exactly as the same was printed and published in the regular edition of the Erie Times-News, published in the issue dated:

03/17/2023

Sworn to and subscribed before on 03/17/2023

PENNSYLVANIA PUBLIC UTILITY COMMISSION NOTICE

Application of Affinity Energy Management, LLC For Approval To Offer, Render, or Furnish Natural Gas Services as a Marketer/Broker Engaged In The Business Of Supplying Natural Gas Supply Services, To The Public In The Commonwealth Of Pennsylvania.

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By and through Counsel: Joseph A. Giordano, Esq.
Giordano, DeCollo, Werb, & Gagne, LLC
5315 Limestone Road
Wilmington, DE 19808
302-234-6855
302-234-6876

(3-8575830-NT-17)

Legal Clerk

Notary, State of WI, County of Brown

My commission expires

Publication Cost: \$236.80
Order No: 8575830 # of Copies:
Customer No: 918333 -1
PO #:

THIS IS NOT AN INVOICE!

Please do not use this form for payment remittance.

VICKY FELTY
Notary Public
State of Wisconsin

RCVD PUC SEC BUR
APR 7 2023 AM 10:33



The Patriot-News

PA MEDIA GROUP

AFFIDAVIT

Ad order # 10603439

Commonwealth of Pennsylvania ss
County of Cumberland:

Christine Arnold, being duly sworn, deposes that she is principal clerk of the PA Media Group; and this notice is an accurate and true attest that Affinity Energy was inserted in The Patriot-News on March 16 2023.

Christine Arnold

(Clerk signature)

this 21 day of March 2023

Shannon L. Garman

Sworn to and subscribed before me this 21st day of March 2023

Commonwealth of Pennsylvania - Notary Seal
Shannon L. Garman, Notary Public
Cumberland County
My commission expires December 30, 2026
Commission number 1431239
Member, Pennsylvania Association of Notaries

APPENDIX F

The Philadelphia Inquirer

100 S. INDEPENDENCE MALL W, STE 600, PHILADELPHIA, PA 19106

Affidavit of Publication

On Behalf of:
AFFINITY ENERGY MANAGEMENT
220 CHERRY BLOSSOM PLACE
HOCKESSIN, DE 19707

STATE OF PENNSYLVANIA COUNTY OF PHILADELPHIA

Before the undersigned authority personally appeared the undersigned who, on oath represented a and say that I am an employee of The Philadelphia Inquirer, LLC, and am authorized to make this affidavit of publication, and being duly sworn, I depose and say

- 1 The Philadelphia Inquirer, LLC is the publisher of the Philadelphia Daily News, with its headquarters at 100 S Independence Mall West, Suite 600, Philadelphia, PA 19106
- 2 The Philadelphia Daily News is an edition of The Philadelphia Inquirer. The Philadelphia Daily News is continuously published and distributed Sunday-Friday in the City of Philadelphia, count and state aforesaid
- 3 The printed notice or publication attached hereto set forth on attached hereto was published in all regular print editions of the Philadelphia Daily News on

Legal Notices

as published in Daily News Legalis in the issue(s) of

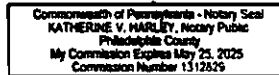
3/16/2023

4 Under oath, I state that the following is true and correct, and that neither I nor The Philadelphia Inquirer, LLC have any interest in the subject matter of the aforesaid notice or advertisement

Helene Sweeney

Katherine V. Harley
Notary Public

My Commission Expires:



Ad No 131026
Customer No 117511

COPY OF ADVERTISEMENT

PENNSYLVANIA PUBLIC UTILITY COMMISSION NOTICE

Application of Affinity Energy Management, LLC For Approval To Offer, Render, or Furnish Natural Gas Services as a Marketer/Broker Engaged In The Business Of Supplying Natural Gas Supply Services, To The Public In The Commonwealth Of Pennsylvania.

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The PUC may consider this application without a hearing. Protests directed to the technical or financial fitness of Affinity Energy Management may be filed within 15 days of the date of this notice with the Secretary of the PUC,

APPENDIX F

400 North Street,
Harrisburg, PA 17120.
You should send copies
of any protest to
Affinity Energy
Management's attorney
at the address listed
below.

By and through
Counsel:
Joseph A.
Giordano, Esq.
Giordano, DeCollo,
Werb, & Gagne, LLC
5315 Limestone Road
Wilmington, DE 19808
302-234-6855
302-234-687

Proof of Publication of Notice in Pittsburgh Post-Gazette

Under Act No 587, Approved May 16, 1929, PL 1784, as last amended by Act No 409 of September 29, 1951

Commonwealth of Pennsylvania, County of Allegheny, ss D. Rullo, being duly sworn, deposes and says that the Pittsburgh Post-Gazette, a newspaper of general circulation published in the City of Pittsburgh, County and Commonwealth aforesaid, was established in 1993 by the merging of the Pittsburgh Post-Gazette and Sun-Telegraph and The Pittsburgh Press and the Pittsburgh Post-Gazette and Sun-Telegraph was established in 1960 and the Pittsburgh Post-Gazette was established in 1927 by the merging of the Pittsburgh Gazette established in 1786 and the Pittsburgh Post, established in 1842, since which date the said Pittsburgh Post-Gazette has been regularly issued in said County and that a copy of said printed notice or publication is attached hereto exactly as the same was printed and published in the regular editions and issues of the said Pittsburgh Post-Gazette a newspaper of general circulation on the following dates, viz:

16 of March, 2023

Affiant further deposes that he/she is an agent for the PG Publishing Company, a corporation and publisher of the Pittsburgh Post-Gazette, that, as such agent, affiant is duly authorized to verify the foregoing statement under oath, that affiant is not interested in the subject matter of the afore said notice or publication, and that all allegations in the foregoing statement as to time, place and character of publication are true.

D. Rullo
PG Publishing Company
Sworn to and subscribed before me this day of:
March 16, 2023

Amy McCay

Commonwealth of Pennsylvania - Notary Seal
Amy McCay, Notary Public
Allegheny County
My commission expires January 24, 2026
Commission number 1323004
Member, Pennsylvania Association of Notaries

STATEMENT OF ADVERTISING COSTS
Affinity Energy Management
220 Cherry Blossom Place
Hockessin, DE 19707

To PG Publishing Company

Total ----- \$371.80

Publisher's Receipt for Advertising Costs

PG PUBLISHING COMPANY, publisher of the Pittsburgh Post-Gazette, a newspaper of general circulation, hereby acknowledges receipt of the aforesaid advertising and publication costs and certifies that the same have been fully paid.

Office
2201 Sweeney Drive
Clinton, PA 15026
legaladvertising@post-gazette.com
Phone 412-263-1440

PG Publishing Company, a Corporation, Publisher of
Pittsburgh Post-Gazette, a Newspaper of General Circulation

By _____

I hereby certify that the foregoing is the original Proof of Publication and receipt for the Advertising costs in the subject matter of said notice.

Attorney For

COPY OF NOTICE OR PUBLICATION

PENNSYLVANIA PUBLIC UTILITY COMMISSION NOTICE
Application of Affinity Energy Management, LLC For Approval To Offer, Render, or Furnish Natural Gas Services as a Marketer/Broker Engaged In The Business Of Supplying Natural Gas Supply Services, TO THE PUBLIC IN THE Commonwealth Of Pennsylvania.
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The PUC may consider this application without a hearing. Protests directed to the technical or financial fitness of Affinity Energy Management may be filed within 15 days of the date of this notice with the Secretary of the PUC, 400 North Street, Hamsburg, PA 17120. You should send copies of any protest to Affinity Energy Management's attorney at the address listed below.
By and through Counsel:
Joseph A. Giordano, Esq.
Giordano, DelCollo, Werb, & Gagne, LLC
5315 Limestone Road
Wilmington, DE 19808
302-234-6855
302-234-6876

The Scranton Times (Under act P.L. 877 No 160. July 9,1976)
Commonwealth of Pennsylvania, County of Lackawanna

AFFINITY ENERGY MANAGEMENT
220 CHERRY BLOSSOM PLACE
HOCKESSIN DE 19707

Account # 648484
Order # 82706955
Ad Price: 315.70

PENNSYLVANIA PUBLIC UTILI

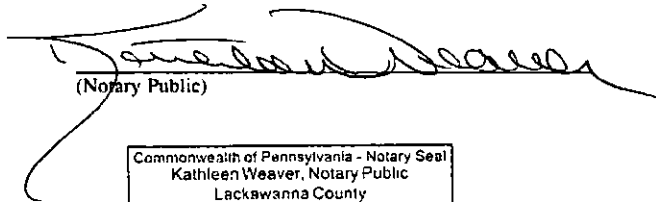
Betzaida Cajigas

Being duly sworn according to law deposes and says that (s)he is Billing clerk for The Scranton Times, owner and publisher of The Scranton Times, a newspaper of general circulation, established in 1870, published in the city of Scranton, county and state aforesaid, and that the printed notice or publication hereto attached is exactly as printed in the regular editions of the said newspaper on the following dates:

03/22/2023

Affiant further deposes and says that neither the affiant nor The Scranton Times is interested in the subject matter of the aforesaid notice or advertisement and that all allegations in the foregoing statement as time, place and character or publication are true Et cetera

Sworn and subscribed to before me
this 22nd day of March A.D., 2023



(Notary Public)

Commonwealth of Pennsylvania - Notary Seal
Kathleen Weaver, Notary Public
Lackawanna County
My commission expires June 14, 2025
Commission number 1314506
Member, Pennsylvania Association of Notaries

**PENNSYLVANIA
PUBLIC UTILITY
COMMISSION
NOTICE**

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By and through Counsel:
Joseph A. Giordano, Esq.
**Giordano, DelCollo,
Webb, & Gagne, LLC**
5315 Limestone Road
Wilmington, DE 19808
302-234-8855
302-234-6876

COMMONWEALTH OF PENNSYLVANIA }
 County of Cambria } SS

On this 22nd day of March, A.D.

**PENNSYLVANIA
 PUBLIC UTILITY COMMISSION
 NOTICE**

Application of Affinity Energy Management, LLC For Approval To Offer, Render, or Furnish Natural Gas Services as a Marketer/Broker Engaged In The Business Of Supplying Natural Gas Supply Services, To The Public In The Commonwealth Of Pennsylvania.

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The PUC may consider this application without a hearing. Protests directed to the technical or financial fitness of Affinity Energy Management may be filed within 15 days of the date of this notice with the Secretary of the PUC, 400 North Street, Harrisburg, PA 17120. You should send copies of any protest to Affinity Energy Management's attorney at the address listed below.

By and through Counsel: Joseph A. Giordano, Esq.
Giordano, DelCollo, Werb, & Gagne, LLC
 5315 Limestone Road, Wilmington, DE 19808
 302-234-6855 • 302-234-6876

no, the subscriber, a
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 of general circulation
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 Pennsylvania and
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 of the Alleghenies on
 ertising and that all

Lejka
 ADVERTISING COSTS

Signed and sworn to before me on
 22nd day of March 2023
 by Christine Marhefka making the statement

Tribune ad	\$ 144.00
Neighbors ad	84.00
Banner ads	144.00
Oath	5.00
Clerical Fee	2.50
Total Cost	\$ 379.50

Vivian Ohs
 (Notary Public)

Commonwealth of Pennsylvania - Notary Seal
 Vivian Ohs, Notary Public
 Cambria County
 My commission expires December 6, 2024
 Commission number 1123017
 Member, Pennsylvania Association of Notaries

To The Tribune-Democrat, Johnstown, PA
 For publishing the notice or publication
 attached hereto on the above stated dates.

PUBLISHER'S RECEIPT FOR ADVERTISING COSTS

_____ for publisher of _____
 a newspaper of general circulation, hereby acknowledges receipt of the aforesaid
 and publication costs and certifies that the same has been duly paid.

 (Name of Newspaper)

By _____

**WILLIAMSPORT SUN-GAZETTE
PROOF OF PUBLICATION**

STATE OF PENNSYLVANIA
COUNTY OF LYCOMING, CLINTON, SULLIVAN &
TIOGA/BRADFORD SS:

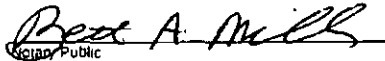
Robert O. Rolley, Jr., Publisher of the Williamsport Sun-Gazette LLC publishes Williamsport Sun-Gazette, successor to the Williamsport Sun and the Gazette & Bulletin, both daily newspapers of general circulation, published at 252 West Fourth Street, Williamsport, Pennsylvania, being duly sworn, deposes and says that the Williamsport sun was established in 1870 and the Gazette & Bulletin was established in 1801, since which dates said successor, the Williamsport Sun-Gazette has been regularly issued and published in the County of Lycoming aforesaid, and that a copy of the printed notice is attached hereto exactly as the same was printed and published in the regular editions of said Williamsport Sun-Gazette on the following dates:

17 Mar 2023

Affiant further deposes that he is an officer duly authorized by the Sun-Gazette LLC, publisher of the Williamsport Sun-Gazette, to verify the foregoing statement under oath and declare that affiant is not interested in the subject matter of the aforesaid notice of publication, and that all the allegations in the foregoing statement as to time, place and character of publication are true


SUN-GAZETTE LLC

Sworn to and subscribed before me
The 17th day of March, 2023


Notary Public

Commonwealth of Pennsylvania - Notary Seal
BETH A MILLER - Notary Public
Lycoming County
My Commission Expires Jun 4, 2024
Commission Number 1297751

**PENNSYLVANIA
PUBLIC UTILITY
COMMISSION
NOTICE**

Application of Affinity Energy Management LLC For Approval To Offer Render or Furnish Natural Gas Services as a Marketer/Broker Engaged in The Business Of Supplying Natural Gas Supply Services To The Public In The Commonwealth Of Pennsylvania.

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By and through Counsel:
Joseph A Giordano, Esq.
Giordano, DeCollo,
Werb, & Gagne, LLC
5316 Limestone Road
Wilmington, DE 19808
302-234-6855
302-234-6876

Pennsylvania Department of State
Bureau of Corporations and Charitable Organizations
PO Box 8722 | Harrisburg, PA 17105-8722
T: 717-787-1057
dos.pa.gov/BusinessCharities

Regarding: Affinity Energy Management, LLC
Request Type: Certificate of Registration **Issuance Date:** February 28, 2023
Request No.: 010518314 **File No:** 0003963982
Receipt No.: 395480
Filing Type: Foreign Limited Liability Company
Filing Subtype: Limited Liability Company
Initial Filing Date: May 28, 2010
Status: Active

RCVD PLC SEC BLR
APR 7 2023 AM 10:34

TO ALL WHOM THESE PRESENTS SHALL COME, GREETING:

I DO HEREBY CERTIFY THAT

Affinity Energy Management, LLC

is a foreign association duly registered to do business in this Commonwealth as of the issuance date herein.

I DO FURTHER CERTIFY THAT this Certificate of Registration shall not imply that all fees, taxes and penalties owed to the Commonwealth of Pennsylvania are paid.



IN TESTIMONY WHEREOF, I have hereunto set my hand and caused the seal of my office to be affixed, the day and year above written.

A handwritten signature in black ink, appearing to read "Albert Schmidt".

Albert Schmidt
Acting Secretary of the Commonwealth

Verify this certificate online at www.file.dos.pa.gov


State of Delaware
Secretary of State
Division of Corporations
Delivered 08:00 AM 03/06/2006
FILED 08:00 PM 03/06/2006
SRV 060218489 - 4120406 FILE

STATE OF DELAWARE
CERTIFICATE OF FORMATION
OF
AFFINITY ENERGY MANAGEMENT, LLC

FIRST: The name of the limited liability company is AFFINITY ENERGY MANAGEMENT, LLC.

SECOND: The address of its registered office in the State of Delaware is 220 Cherry Blossom Place, Hockessin, Delaware 19707. The name of its Registered Agent at such address is Edward C. Jackson.

IN WITNESS WHEREOF, the undersigned has executed this Certificate of Formation of AFFINITY ENERGY MANAGEMENT, LLC this 1st day of March, 2006.


EDWARD C. JACKSON

RCUD PUC SEC BUR
APR 7 2023 AM 10:34



State of Delaware

SECRETARY OF STATE
DIVISION OF CORPORATIONS
P.O. BOX 888
DOVER, DELAWARE 19903

ATTACHMENT 2

060218489

9433145
JOHN E SULLIVAN
5305 LIMESTONE ROAD
STE 200
WILMINGTON
ATTN: JOHN E SULLIVAN

DE 19808

03-20-2006

DESCRIPTION	AMOUNT
AFFINITY ENERGY MANAGEMENT, LLC	
4120406 0102Y Register L.L.C.	
Formation Fee	70.00
Court Municipality Fee, Wilm.	20.00
FILING TOTAL	90.00
TOTAL PAYMENTS	90.00
SERVICE REQUEST BALANCE	.00



March 20, 2023

Edward C. Jackson
Affinity Energy Management, LLC
220 Cherry Blossom Place
Hockessin, DE 19707

RCVD PUC SEC BUR
APR 7 2023 AM 10:34

Dear Edward C. Jackson:

We are pleased that Affinity Energy Management, LLC has applied for a license to provide Natural Gas Broker/Marketer Services on the distribution system of Columbia Gas of Pennsylvania, Inc. ("Columbia Gas").

Under Paragraph 2.4.5 of the Rules Applicable to Distribution Service section of the Tariff of Columbia Gas, Affinity Energy Management, LLC could be required to provide to Columbia Gas a bond or other financial security instrument in an amount that Columbia Gas determines to be appropriate. Affinity Energy Management, LLC has indicated only brokering and consulting services will be provided. Therefore, we have determined at this time that Affinity Energy Management, LLC does not need a bond or other financial security requirement to provide broker natural gas services to Columbia Gas customers.

If the creditworthiness requirement or Columbia Gas' exposure to Affinity Energy Management, LLC changes in the future, Columbia Gas might deem it appropriate to require Affinity Energy Management, LLC to provide a bond or other financial security instrument.

Please feel free to contact me at 614-460-4980 should you have any questions regarding a bond or other financial security instrument requirements of Columbia Gas.

Sincerely,

A handwritten signature in cursive script that reads 'Kyhia Davis'.

Kyhia Davis
Manager of Choice and Transportation Support Services



National Fuel

March 27, 2023

Edward C. Jackson, Principal
Affinity Energy Management, LLC
220 Cherry Blossom Place, Hockessin, DE 19707

Dear Edward,

National Fuel Gas Distribution Corporation ("NFGDC") is aware Affinity Energy Management LLC (AEM) has filed an application with the Pennsylvania Public Utility Commission to supply natural gas service to the public in Pennsylvania and specifically within the service territory of NFGDC.

As you know, in making such an application, AEM must furnish acceptable security to each utility where AEM will do business. As such, under its tariff, NFGDC could require AEM to provide a bond or other financial security instrument in an amount that NFGDC determines to be appropriate.

However, you have indicated, and it is NFGDC's understanding that AEM intends only to provide natural gas aggregating, brokering and consulting services at this time. You have stated that, in performing these services, AEM will never take title to any delivered natural gas, nor will it accept any customer payments or deposits.

Based upon your representations, NFGDC has determined that, at this time, AEM does not need to post a bond or other form of security to operate in its service territory. However, if the services provided by AEM change in the future, NFGDC reserves the right to require security from AEM as it deems appropriate.

If you have any questions concerning the foregoing, please contact me at 716-857-7541.

Yours truly,

Nicole Barker
Transportation Services Department



March 22, 2023

Affinity Energy Management, LLC
220 Cherry Blossom Place
Hockessin, DE 19707

Re: Bonding Requirements

Dear Affinity Energy Management, LLC:


PECO is aware that Affinity Energy Management, LLC has applied for a license to provide brokering and consulting services to commercial and industrial customers on the distribution system of PECO.

In making such an application Affinity Energy Management, LLC could be required to provide to PECO a bond or other acceptable financial security in an amount that PECO determines to be appropriate. Affinity Energy Management, LLC has indicated that it intends to provide only brokering and consulting services to commercial and industrial customers will not take title to any delivered natural gas; nor will accept any customer payments or deposits.

Therefore, PECO has determined at this time that Affinity Energy Management, LLC does not need a bond or other financial security requirement, since they are not directly engaging in business with PECO and only providing brokering or consulting services to PECO customers. However, if the services provided by Affinity Energy Management, LLC or the creditworthiness requirement for PECO's exposure to Affinity Energy Management, LLC changes in the future, PECO reserves the right to require Affinity Energy Management, LLC to provide a bond or other financial security instrument.

If you should have any questions regarding this matter, please contact Wanda Rucker at wanda.rucker@exeloncorp.com.

Respectfully submitted,


Suzette Adams (AW)
Manager, Gas Supply and Transportation
2301 Market
Philadelphia, PA 19103



375 North Shore Drive
Pittsburgh, Pennsylvania 15212

www.peoples-gas.com

Carol Scanlon
Manager, Rates

Peoples Natural Gas Company LLC
Phone: 412-208-6931
Email: Carol.Scanlon@peoples-gas.com

March 20, 2023

Edward Jackson, Principal
Affinity Energy Management, LLC
220 Cherry Blossom Place
Hockessin, DE 19707

Dear Mr. Jackson:

We are pleased that Affinity Energy Management, LLC has applied for a license to provide natural gas services on Peoples Natural Gas Company LLC. Specifically you have requested to be licensed as a supplier on the distribution systems of Peoples Natural Gas Division and Peoples Gas Division (formerly Peoples TWP).

Since Affinity Energy Management, LLC is not currently serving customers on the Peoples systems, we have determined at this time that Affinity Energy Management, LLC does not need a bond or other financial security requirement to provide these services to the Company's customers.

If a Pool is established, and customers are enrolled which alters the creditworthiness requirement or the Company's exposure to Affinity Energy Management, LLC's provision of services on the Peoples' system changes in the future, the Company may deem it appropriate to require a bond or other financial instrument.

If you have any questions feel free to contact me at 412-208-6931 or by email at Carol.Scanlon@peoples-gas.com.

Sincerely,

A handwritten signature in cursive script that reads "Carol Scanlon".

Carol Scanlon
Manager, Rates
Peoples Natural Gas Company LLC

Cc: Stephen Kelly
Mina Speicher



PHILADELPHIA GAS WORKS

800 West Montgomery Avenue • Philadelphia, PA 19122

3/21/2023

Mr. Edward Jackson
Affinity Energy Management, LLC
220 Cherry Blossom Place.
Hockessin, DE 19707

ed@affinityenergy.net

RE: Security Requirement Bond for Affinity Energy Management, LLC

Dear Mr. Martin,

Philadelphia Gas Works ("PGW") is aware that Affinity Energy Management, LLC has filed an application with the Pennsylvania Public Utility Commission to supply natural gas services to the public in Pennsylvania and specifically within the services territory of Philadelphia Gas Works.


As you know, in making such an application, Affinity Energy Management, LLC must furnish acceptable security to each utility where Affinity Energy Management, LLC will do business. As such, under its tariff, Philadelphia Gas Works could require Affinity Energy Management, LLC, to provide a bond or other financial security instrument in an amount that Philadelphia Gas Works determines to be appropriate.

However, you have indicated, and it is Philadelphia Gas Works' understanding, that Affinity Energy Management, LLC intends only to provide natural gas aggregating, brokering, and consulting services at this time. You have stated that in performing these services Affinity Energy Management, LLC will never take title to any delivered natural gas.

Based upon your representations, Philadelphia Gas Works has determined that, at this time, Affinity Energy Management, LLC, does not need to post a bond or other form of security to operate in its service territory. If the services provided by Affinity Energy Management, LLC, should change, Philadelphia Gas Works reserves the right to require security from Affinity Energy Management, LLC as it deems appropriate.

If you have any questions concerning the foregoing, please contact me at 215-684-6725.

Sincerely,


John C. Zuk (Mar 21, 2023 11:38 EDT)

JOHN C. ZUK
Sr. Vice President, Gas Management

/dls



UGI Utilities, Inc.
1 UGI Drive
Denver, PA 17517
610-796-3400

VIA E-MAIL

March 24, 2023

Affinity Energy Management, LLC
220 Cherry Blossom Place
Hockessin, DE 19707

ATTENTION: Edward C. Jackson, Principal

**RE: Affinity Energy Management, LLC
Application to Serve as a Natural Gas Broker**

Dear Mr. Jackson,

Based on your assertion that Affinity Energy Management, LLC ("Affinity Energy") is applying with the State of Pennsylvania to operate as a natural gas broker/marketer, UGI Utilities, Inc.-Gas Division ("UGIU") has concluded that Affinity Energy will not need to post security with UGIU. This is based on the declaration that Affinity Energy will be acting in conjunction with a licensed natural gas supplier who has been approved by the Pennsylvania Public Utility Commission to serve in the applicable UGIU service territories and who has posted the required financial security as specified in the UGIU Tariff. If Affinity Energy wishes to directly serve Choice customers in the service territories of UGIU in the future as a natural gas supplier, it will have to post security as specified in the UGIU Tariff prior to the commencement of the service.

Please feel free to contact me with any additional questions you may have.

Sincerely,

A handwritten signature in cursive script that reads 'Sherry Epler'.

Sherry Epler
Senior Manager
Tariff & Supplier Administration

SE/rks



VALLEY ENERGY

523 S. Keystone Avenue, P.O. Box 340, Sayre, PA 18840
800/998-4427 • 570/888-9664 • FAX 570/888-6199

March 20, 2023

VIA EMAIL

Chad Jackson, P.E., C.E.P.
Energy Consultant
220 Cherry Blossom Place
Hockessin, DE 19707
chad@affinityenergy.net

RE: Affinity Energy Management

Dear Mr. Jackson:

We understand that Affinity Energy Management has applied with the Pennsylvania Public Utility Commission to supply natural gas services to the public in Pennsylvania including our company's service area.

Because Affinity Energy Management intends to only provide natural gas aggregating, brokering, and consulting services at this time, we have determined that Affinity Energy Management will not be required to post a bond or other form of financial security instrument to provide these services in our service area. However, if the services provided change in the future, we reserve the right to require security from Affinity Energy Management as deemed appropriate.

If you have any questions, please contact Jamie Beale at 570-888-9664 (Ext. 5232).

Sincerely,

A handwritten signature in black ink, appearing to read "E.E. Rogers". The signature is written in a cursive, flowing style.

Edward E. Rogers
President & CEO

EER/km

cc: J. Beale, Valley Energy



Attachment 4 Balance Sheets and Profit & Loss Statements filed separately under confidential seal.

RCUD PUC SEC 8, 7
APR 7 2021



Attachment 5 Schedule C Profit and Loss From Business filed separately under confidential seal.

RCUD PUC SEC BUR
APR 7 2023 AM 10:34

Resume – Ed Jackson

Principal – Edward C. Jackson
302-218-8920
FAX 302-234-0829
Email: ed@affinityenergy.net

RCVD PUC SEC BUR
APR 7 2023 AM 10:34

Experience

Principal for Affinity Energy Management (2006 – Present)

- Functions as a broker for electric supply, natural gas supply, and demand response for non-residential customers
- Actively participates in business development and maintains client relationships
- Performs day to day operations of the company as principal
- Current clients range from aggregation buying groups of chicken farmers, small & medium commercial customers, large commercial & industrial customers as well as the State of Delaware (including electricity, natural gas and Demand Response)

Corporate Energy Manager for MBNA America (2001 – 2006)

- Responsible for competitive procurement of electricity, natural gas, oil, etc. for all MBNA sites in 10 states and Canada
- Worked with Facility Managers and Building Engineers to develop and implement energy reduction initiatives across the company – achieved a 12% energy reduction over 4 years
- Active member of in-house design teams to assure energy efficiency was built-in to new construction and renovation projects

Delmarva Power (1983 – 2001)

- Worked across the company in various regulated departments including Marketing, Customer Engineering, Planning, Finance, etc. Also worked in Delmarva's unregulated energy services company, Conectiv Solutions in project development and sales roles from 1995 – 2001.

Other

- BS Mechanical Engineering, University of Delaware May 1983
- Certified Energy Manager (AEE)
- Certified Energy Procurement Professional (AEE)
- Certified Lighting Efficiency Professional (AEE)
- Knowledgeable of competitive energy markets in the mid-Atlantic states (PJM) and selected other states and Ontario.
- Well respected as an authority on deregulation and competitive markets in PJM.

ATTACHMENT 6

- Endorsed by several Chambers of Commerce and trade associations as their preferred or endorsed energy broker.
- Presented at the AEE World Energy Engineering Congress in Washington, DC on September 14, 2006. Presentation was titled "Energy Master Planning: Making the Corporate Culture Work for You".
- Presented a seminar entitled "Preparing for Deregulation in Delaware – Let's Go Shopping!" at an International Facility Management Association (IFMA) meeting on March 14, 2006.
- Featured speaker at the Governor's Energy Summit on June 20, 2006 covering the topic of aggregation, working with buyer's pools, brokers, consultants, etc.
- Actively follow energy rate case issues in Delaware, Maryland, and Pennsylvania
- Knowledgeable and have been actively participating in PJM's Demand Response Program
- Active member of the Philadelphia Chapter of the Association of Energy Engineer's and Delaware Chapter of IFMA

Charles (Chad) Jackson, P.E., C.E.P.

1338 East Eyre Street, Philadelphia, PA 19125 • 302-593-7545 • chad@affinityenergy.net

EDUCATION AND TRAINING

Registered Professional Engineer (PE) and Certified Energy Professional (CEP)

Bachelor of Science - Mechanical Engineering (Minor in Civil Engineering), University of Delaware, 2013

Technical Skills: Revit, Auto-CAD, HAP, Trace, Solidworks, Microsoft Office, Bluebeam, and Adobe Acrobat

Knowledgeable in: ASHRAE, IMC, IECC, IBC, IPC, API, ASME, ASTM, ANSI, and OSHA Standards

PROFESSIONAL EXPERIENCE

Affinity Energy Management, Hockessin, DE, June 2020 - Present

Energy Consultant

- Electric and Natural Gas procurement and contract review for end-use customers
- Solar and Renewable Energy Projects
- Demand Response
- Business Development and Sales

Burns Engineering, Philadelphia, PA, April 2019 - April 2020 (1 year)

Mechanical Engineer

- Mechanical and Plumbing engineering calculations and system analysis for building equipment and piping
- Preparing MEPFP construction documents
- Design and development of Revit and Auto-CAD models; Shop drawing and submittal review

DEDC, Philadelphia, PA, February 2017 - March 2019 (2 years)

HVAC and Plumbing Engineer

- Business Development
- Designated project manager for multiple projects at a time and experience managing other engineers

KBR, Newark, DE, 2013 - 2017 (3.5 years total)

Field Engineer at Monroe Energy Refinery (July 2016 - February 2017)

- Managing subcontractors on a day to day basis ensuring quality and completeness in the field of all construction related tasks
- Handle all RFIs submitted in the field, specifically civil, mechanical, and piping issues

Mechanical Engineer (2014 - July 2016)

Collaborate with end use customers, contractors, and vendors to assure timely and cost effective completion of projects.

Develop construction scopes of work. Review and approve vendor drawings & bids [or submissions].

- Design and specify equipment, including vessels, heat exchangers, and compressors.

Instrumentation and Controls Engineer (2013 - 2014)

RCVD PUC SEC BUR
APR 7 2023 AM 10:34