



August 18th, 2023

To Whom it May Concern,

This document contains attachments which are amendments and/or supplemental information for Electric Advisors' Natural Gas Supplier Application. The first attachment is additional contact information for section 1e.

The second attachment is a letter from Philadelphia Gas Works stating that they do not require a bond from us to act as a natural gas broker within their territory.

The last several pages of this document are copies of Electric Advisors' proof of licensure to broker natural gas in Washington, D.C., Maryland, Massachusetts, and Virginia. You will also find a letter from the state of Connecticut stating that they do not require a license.

In the original application, Delaware was mistakenly listed as a state where Electric Advisors is licensed to broker natural gas. The docket number included on the application was in reference to our electricity broker license, not a natural gas license.

Three months' worth of bank statements have been sent via mail, as per your request. Should you require any further information, please contact me at the below phone number or email address.

Thank you,

A handwritten signature in black ink that reads 'Emily Clagett'.

Emily Clagett
Office Administrator
Electric Advisors, Inc.
Emily.clagett@electricadvisors.com
(240) 752-6866

In reference to section 1e:

Please include the following as a secondary contact for consumer service complaints.

Emily Clagett, Office Administrator
5272 River Rd, Suite 440
Bethesda, MD 20816
(240) 752-6866 (p)
(240) 752-6864 (f)
Emily.clagett@electricadvisors.com



PHILADELPHIA GAS WORKS

800 West Montgomery Avenue • Philadelphia, PA 19122

7/11/2023

Ms. Emily Clagett
5272 River Road, Suite 440
Bethesda, MD 20816

Email: Emily.Clagett@electricadvisors.com

RE: Security Requirement Bond for Electric Advisors, Inc

Dear Ms. Clagett,

Philadelphia Gas Works ("PGW") is aware that Electric Advisors, Inc 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, Electric Advisors, Inc must furnish acceptable security to each utility where Electric Advisors, Inc will do business. As such, under its tariff, Philadelphia Gas Works could require Electric Advisors, Inc 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 Electric Advisors, Inc intends only to provide natural gas aggregating, brokering and consulting services at this time. You have stated that in performing these services Electric Advisors, Inc will never take title to any delivered natural gas.

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

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

Sincerely,

John C Zuk

John C Zuk (Jul 11, 2023 14:14 EDT)

JOHN C. ZUK
Sr. Vice President, Gas Management

/dls

STATE CORPORATION COMMISSION**LICENSE NO. A-60A**

Electric Advisors, Inc.

is hereby granted this license pursuant to the Code of Virginia to provide only the following products and services:

Natural Gas Aggregation Services
Electric Aggregation Services

in service territories of the following local distribution company retail access programs:

Washington Gas Light Company and Columbia Gas of Virginia, Inc. (for Natural Gas Aggregation Services)
and
Dominion Energy Virginia and Appalachian Power Company (for Electric Aggregation Services)

to the following customer classes:

Commercial
Industrial

This license is granted pursuant to the State Corporation Commission's Order Granting License dated October 4, 2019, in Case No. PUR-2018-00146, and incorporates all terms, conditions or restrictions set forth therein, or as subsequently amended.

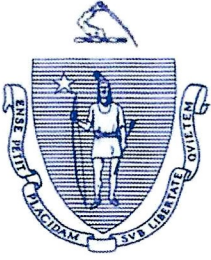
This license is not valid authority for the provision of any product or service not identified herein to any customer.

Failure of the licensee to comply with any applicable Federal Energy Regulatory Commission or State Corporation Commission Orders and/or Rules and all state and federal laws may result in the revocation, suspension or modification of this license, the imposition of appropriate fines and/or penalties, or additional actions may be taken as necessary to protect the public interest.

Dated at Richmond, Virginia _____ October 4, 2019

STATE CORPORATION COMMISSION

By *Wach G. Christie*
Commissioner



THE COMMONWEALTH OF MASSACHUSETTS
DEPARTMENT OF PUBLIC UTILITIES

CHARLES D. BAKER
GOVERNOR

KARYN E. POLITO
LIEUTENANT GOVERNOR

MATTHEW A. BEATON
SECRETARY OF ENERGY
AND ENVIRONMENTAL AFFAIRS

ONE SOUTH STATION
BOSTON, MA 02110
(617) 305-3500

ANGELA M. O'CONNOR
CHAIRMAN

ROBERT E. HAYDEN
COMMISSIONER

CECILE M. FRASER
COMMISSIONER

February 23, 2018

Russell Lacey
Electric Advisors, Inc.
5272 River Road Suite 440
Bethesda, MD 20816

Mr. Lacey,

The Department of Public Utilities has reviewed Electric Advisors, Inc.'s ("Electric Advisors") application for a Gas Retail Agent license to serve commercial and industrial customers in the Commonwealth of Massachusetts. I am pleased to inform you that the application has been approved. Electric Advisors' license number is **RA-201**.

As a condition of maintaining its license, Electric Advisors must file updated information within 30 days of any material change in the information required by 220 CMR 14.04(2), and must comply with all relevant requirements of G.L. c. 164 and the regulations thereunder, including 220 CMR 12.00, 14.00. If you decide to request renewal of Electric Advisors' license next year, please submit a renewal application at least 30 days prior to the expiration of this license.



Sincerely,


Mark D. Marini, Secretary

DOUGLAS R. M. NAZARIAN
CHAIRMAN

HAROLD D. WILLIAMS
SUSANNE BROGAN
LAWRENCE BRENNER



PUBLIC SERVICE COMMISSION

#23, 7/8/09 AM; ML#115011
License Reference No.: IR-1523

July 8, 2009

Russell Lacey, President
Electric Advisors, Inc.
4733 Bethesda Avenue, Suite 450
Bethesda, Maryland 20814

Dear Mr. Lacey:

On February 11, 2009, Electric Advisors, Inc. filed an Application for a license to supply natural gas or natural gas supply services in Maryland under COMAR 20.54. The Company proposes to provide gas broker services in Maryland for commercial and industrial customers with no restrictions upon the number and size of end use customers as described in the application.

After considering this matter at the July 8, 2009 Administrative Meeting, the Commission granted Electric Advisors, Inc. a license to supply natural gas or natural gas supply services in Maryland in accordance with its Application (License Reference Number IR-1523). The license granted by the Commission under this Letter Order is limited to gas broker services only. Additionally, the Commission directed the Company to pay a penalty in the amount of the assessment it would have paid during the period it operated without a license in Maryland or \$100.00, whichever is larger. Based on the "back" assessments calculated by Staff, the penalty amount to be paid by the Company is \$100. Payment shall be made to "The Maryland Public Service Commission".

Finally, Electric Advisors, Inc. is reminded that it is under a continuing obligation to notify the Commission of any substantial changes to the information upon which the Commission relied in granting this license. A copy of the supplemental or updated information is required to be filed concurrently with the Office of People's Counsel.

By Direction of the Commission,

/s/ Terry J. Romine

Terry J. Romine
Executive Secretary

TJR/gjd

c: Phil VanderHeyden, Electricity Division
Paula M. Carmody, People's Counsel

WILLIAM DONALD SCHAEFER TOWER • 6 ST. PAUL STREET • BALTIMORE, MARYLAND 21202-6806

410-767-8000 • Toll Free: 1-800-492-0474 • FAX: 410-333-6495

MDRS: 1-800-735-2258 (TTY/Voice) • Website: www.psc.state.md.us

GA - 09 - 2 - 4

PUBLIC SERVICE COMMISSION OF THE DISTRICT OF COLUMBIA
1333 H STREET N.W., 2ND FLOOR, WEST TOWER
WASHINGTON, D.C. 20005

2009 JUL -9 P 4:41

ORDER

DISTRICT OF COLUMBIA
PUBLIC SERVICE COMMISSION

July 9, 2009

FORMAL CASE NO. GA 09-2, IN THE MATTER OF THE APPLICATION OF
ELECTRIC ADVISORS INC. FOR A NATURAL GAS SUPPLIER LICENSE,
Order No. 15321

1. By this Order, the Public Service Commission of the District of Columbia ("Commission") grants a license to Electric Advisors Inc. ("Electric Advisors" or "Applicant") to function as a natural gas supplier in the District of Columbia.¹ Specifically, Electric Advisors intend to operate as a supplier of natural gas for commercial customers in the District of Columbia, pursuant to the licensing requirements set forth in Order No. 12903.²

2. On June 3, 2009, Electric Advisors filed its license application.³ Pursuant to the Commission's licensing requirements as set forth in Order No. 12903,⁴ Electric Advisors provided the following information:

- a) Proof of technical and managerial competence;
- b) An affidavit of compliance with applicable Federal and District of Columbia environmental laws and regulations dated June 3, 2009;
- c) Proof of financial integrity;
- d) Proof that Electric Advisors has registered with the Department of Consumer and Regulatory Affairs to do business in the District of Columbia;

¹ See GT 96-3, *In the Matter of the Application of Washington Gas Light Company, District of Columbia Division, for Authority to Establish a New Rate Schedule No. 1A*, Order No. 12709, rel. April 25, 2003, as revised by Order 12903, rel. September 5, 2003. Attachment A to Order No. 12709 defines a natural gas supplier as "a licensed person, broker, or marketer, who generates natural gas; sells natural gas; or purchases, brokers, arranges or markets natural gas for sale to customers."

² See GT 96-3, Order No. 12709, as revised by Order No. 12903; and generally, D.C. Act 14-48, "Prevention of Unauthorized Switching of Customer Natural Gas Accounts Temporary Act of 2001." The Commission is directed to govern the licensing of Natural Gas Suppliers and other market participants.

³ See GA 09-2, *In the Matter of the Application of Electric Advisors Inc. for a Natural Gas Supplier License, Application of Electric Advisors Inc.*, filed June 3, 2009.

⁴ See GT 96-3, Order No. 12709, as revised by Order No. 12903, at Attachment C, rel. April 25, 2003.

- e) An affidavit that Electric Advisors is subject to all applicable taxes;
- f) An affidavit dated June 3, 2009, stating that Electric Advisors will comply with all the requirements of all orders and regulations of the Commission; and
- g) Electric Advisor's website address: www.electricadvisors.com .

3. After a complete review of the Application and supplemental documentation,⁵ the Commission finds that granting the Application of Electric Advisors Inc. will serve the public interest. The information contained in its Application demonstrates that the applicant has the ability and the financial integrity to serve natural gas customers in the District of Columbia.

THEREFORE, IT IS ORDERED THAT:

4. The Application of Electric Advisors Inc. for a license to conduct business in the District of Columbia as a natural gas supplier is hereby **GRANTED**.

A TRUE COPY:

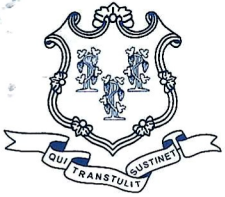
BY DIRECTION OF THE COMMISSION:



CHIEF CLERK:

**DOROTHY WIDEMAN
COMMISSION SECRETARY**

⁵ Electric Advisors Inc. supplemented its Application by providing additional financial information to demonstrate that it has sufficient financial resources to operate as a supplier of natural gas in the District of Columbia. See Formal Case No. GA 09-2, Supplemental filing, dated June 19, 2009.



STATE OF CONNECTICUT

DEPARTMENT OF PUBLIC UTILITY CONTROL

December 13, 2012

In reply, please refer to:

Docket No. 12-11-20:ES:RFB

Mr. Russell Lacey
Electric Advisors, Inc.
5272 River Road, Suite 440
Bethesda, MD 20816

Re: Docket No. 12-11-20 -- Application of Electric Advisors, Inc. for a Certificate of Registration for Electric Aggregator

Dear Mr. Lacey:

The Connecticut Public Utilities Regulatory Authority (Authority) acknowledges receipt on November 19, 2012, of your application for an Electric Aggregator Registration Certificate submitted in the above-referenced docket.

Pursuant to the General Statutes of Connecticut, §16-1(a)(31), an "electric aggregator" is defined as a person that "gathers together electric customers for the purpose of negotiating the purchase of electric generation services from an electric supplier...provided such person...is not engaged in the purchase or resale of electric generation services, and provided further such customers contract for electric generation services directly with an electric supplier." In interpreting this statute, the Authority has consistently held that electric aggregators are the customers' agent and therefore, their loyalty must lie with the customers, and they may not represent or act as an agent or representative for any supplier at any time, in any capacity. Docket No. 99-09-21RE01, Application of Levco Tech, Inc. for an Electric Aggregation License – Operations, Decision dated June 17, 2009, pp. 3 and 4; and Docket No. 10-06-24, DPUC Review of the Current Status of the Competitive Supplier and Aggregator Market in Connecticut and Marketing Practices and Conduct of Participants in That Market, Interim Decision dated August 11, 2010, pp. 2 and 3.

You stated in your response to Exhibit B-4(g) in your application that "Electric Advisors will only offer brokerage services." Based on this information, it appears that Electric Advisors, Inc. intends to operate as a broker/marketer, and not as an aggregator as defined by law. Connecticut law currently does not require electric agents or brokers to be registered or licensed.

Therefore, the Authority cannot process your application and hereby closes this docket without prejudice.

Sincerely,

DEPARTMENT OF ENERGY AND ENVIRONMENTAL PROTECTION
PUBLIC UTILITIES CONTROL AUTHORITY

A handwritten signature in black ink, appearing to read "K. Santopietro". The signature is written in a cursive style with a large initial "K" and a distinct "Santopietro" following.

Kimberley J. Santopietro
Executive Secretary

cc: Service List