

**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. and A-2020-3020266

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

Peter Widmer

peter.widmer@powertakeoff.com and 303-353-1107

1750 30th St., #420, Boulder, CO 80301

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, President

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

Peter Widmer

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 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 PALM BEACH :

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

[He/she is the President (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.

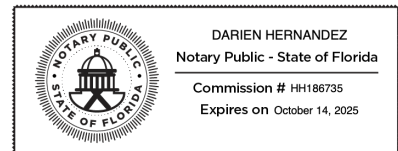
Peter Widmer Peter Widmer, President of Power TakeOff Inc.

Signature of Affiant

Sworn and subscribed before me this 4th day of June, 2024.

[Signature] Darien Hernandez, Online Notary Pu

Signature of official administering oath



My commission expires: October 14th, 2025

This notarial act was an online notarization
Produced a Colorado Driver's License

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 B – 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: peter.widmer@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: 303-353-1107
- 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 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.

A-2020-3020266

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.

Parent of Power TakeOff, Inc.: **PTO Buyer, Inc.** – not currently doing business in Pennsylvania
Contact information: 274 Riverside Avenue, 3rd Floor, Westport CT 06880
Peter Widmer, 303-353-1107, peter.widmer@powertakeoff.com

Parent of PTO Buyer, Inc.: **PTO Midco, Inc.** – not currently doing business in Pennsylvania
Contact information: 274 Riverside Avenue, 3rd Floor, Westport CT 06880
Peter Widmer, 303-353-1107, peter.widmer@powertakeoff.com

Parent of PTO Midco, Inc and Ultimate Parent: **PTO Holdings, L.P.** – not currently doing business in Pennsylvania
Contact information: 274 Riverside Avenue, 3rd Floor, Westport CT 06880
Peter Widmer, 303-353-1107, peter.widmer@powertakeoff.com

- 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. – not currently doing business in Pennsylvania
Contact Information: 420 Erb Street West, 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. BC Hydro
 - Paul Seo, Program Manager
 - paul.seo@bchydro.com
 - (604) 623-4386
 - Power TakeOff implemented DSM energy efficiency services.
2. ConEdison
 - Jackie De Roche
 - derochej@coned.com
 - (646) 875-2433
 - Power TakeOff implements DSM energy efficiency services.
3. DTE Energy
 - Don Boza, Principal Energy Manager
 - donald.boza@dteenergy.com
 - (313) 235-6706
 - Power TakeOff implemented DSM energy efficiency services.
4. Duke Energy
 - Jeremy Morrison
 - Jeremy.morrison@duke-energy.com
 - (919) 592-3210
 - Power TakeOff implements DSM energy efficiency services.
5. Ft. Collins Utilities
 - David Suckling, Business Energy Efficiency
 - dsuckling@fcgov.com
 - (970) 416-4251
 - Power TakeOff implemented DSM energy efficiency services.
6. Georgia Power
 - Tony Donald, EE Program Manager
 - jadonald@southernco.com
 - (404) 608-5704
 - Power TakeOff implemented DSM energy efficiency services.
7. MN Power
 - Emily Heiken
 - eheiken@mnpower.com
 - (218) 355-3070
 - Power TakeOff implements DSM energy efficiency services.

- 8. PG&E
 - Arash Kialashaki, Rotational Supervisor
 - arash.kialashaki@pge.com
 - (414) 940-0324
 - Power TakeOff implements DSM energy efficiency services.
- 9. Puget Sound Energy
 - Tyson Schmitt
 - Tyson.schmitt@pse.com
 - (360)570-6806
 - Power TakeOff implements DSM energy efficiency services.
- 10. San Diego Gas & Electric
 - Zach Shumake
 - ZShumake@sdge.com
 - (619) 676-7902
 - Power TakeOff implemented DSM energy efficiency services.
- 11. Southern California Edison
 - Amri Christianto, Program Manager
 - amri.christianto@sce.com
 - (626) 302-0718
 - Power TakeOff implemented DSM energy efficiency services.
- 12. United Illuminating
 - Fred Schiavi
 - Fred.schiavi@uinet.com
 - (203) 499-2572
 - Power TakeOff implements DSM energy efficiency services.
- 13. Washington Gas
 - Hillary Tipton
 - Hilarry.tipton@washgas.com
 - (571) 455-8965
 - Power TakeOff implemented DSM energy efficiency services.
- 14. Xcel Energy
 - Kaitlyn Henke, Associate Product Portfolio Manager
 - Kaitlyn.E.Henke@xcelenergy.com
 - (218) 591-5132
 - Power TakeOff implements DSM energy efficiency services.
- 15. ComEd
 - Rick Tonielli, Sr. Program Manager
 - Richard.tonielli@comed.com
 - (779) 231-3083
 - Power TakeOff implements DSM energy efficiency pilots.
- 16. Duke Energy
 -

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

1. DNV
 - Bill Schoellkopf, Assistant Operations Manager
 - william.schoellkopf@dnv.com
 - 484-401-5057
 - Power TakeOff contracts with DNV to provide energy efficiency programming to EDCs.
2. Focus on Energy
 - Courtney Wojcik
 - courtney.wojcik@focusonenergy.com
 - (920) 562-4177
 - Power TakeOff has contracted with Focus on Energy to provide the Virtual Commissioning® (VCx®) energy efficiency programming to EDCs.
3. Franklin Energy
 - Liz McQuaide
 - EMcQuaide@franklinenergy.com
 - (412-290-3888
 - Power TakeOff contracts with Franklin Energy to provide energy efficiency programming to EDCs.
4. ICF
 - Junior Myrie
 - unior.myrie@icf.com
 - (443) 718-4897
 - Power TakeOff contracts with ICF to provide energy efficiency programming to EDCs.
5. CLEARresult
 - Prad Challa, Director Strategic Partnerships
 - Pradyumna.Challa@CLEARresult.com
 - (512) 416-5995
 - Power TakeOff contracts with CLEARresult to provide energy efficiency services to EDCs.
6. Leidos
 - Libby Stevenson
 - l Stevenson@leidos.com
 - (309) 213-5585
 - Power TakeOff contracts with Leidos to provide energy efficiency programming to EDCs.

7. Resource Innovations

- o Drew Samuels, Program Manager
 - asamuels@resource-innovtions.com
 - 630-480-8138
- o Power TakeOff contracts with Resource Innovations to provide the Virtual Commissioning® (VCx®) energy efficiency programming to multiple EDCs.

8. TRC

- o David Azar, Program Manager
 - DAzar@trccompanies.com
 - 314-256-2622
- o Power TakeOff contracts with TRC to provide energy efficiency programming to Ameren MO.

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.

Entity	Address	Directors & Officers
Power TakeOff, Inc.	1750 30 th St, #420, Boulder, CO 80301 800-303-9890	<u>Directors</u> - Kevin Martin - Peter Widmer <u>Officers</u> - Kevin Martin –CEO - Peter Widmer – President - David Siddiqui - COO - Jamie Zynger – VP Finance & Accounting
PTO Buyer, Inc.	274 Riverside Avenue, 3 rd Floor, Westport CT 06880 800-303-9890	<u>Directors</u> - Kevin Martin - Peter Widmer <u>Officers</u> - Kevin Martin –CEO - Peter Widmer – President - Jamie Zynger – VP Finance & Accounting
PTO Midco, Inc.	274 Riverside Avenue, 3 rd Floor, Westport CT 06880 800-303-9890	<u>Directors</u> - Kevin Martin - Peter Widmer <u>Officers</u> - Kevin Martin –CEO - Peter Widmer – President - Jamie Zynger – VP Finance & Accounting
PTO Holdings, L.P.	274 Riverside Avenue, 3 rd Floor, Westport CT 06880 800-303-9890	<u>Directors</u> - Mark Lewis - Blair Barlow - Kevin Martin

		<ul style="list-style-type: none"> - Peter Widmer - Mike Howard - Carrie Zalewski - Radhika Schroff <p><u>Officers</u></p> <ul style="list-style-type: none"> - Kevin Martin –CEO - Peter Widmer – President - Jamie Zynger – VP Finance & Accounting
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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 for all principal officers and senior management are attached to this application as **EXHIBIT C – RESUMES**.

1. 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
- Maryland – registered with Maryland Department Assessments and Taxation
- New Jersey – registered with New Jersey Department of the Treasury
- 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, President
(Please Print)

Date : June 4, 2024

APPENDIX A - AFFIDAVIT

[Commonwealth/State] of FLORIDA :

: ss.

County of PALM BEACH :

Peter Widmer, being duly affirmed according to law, deposes and says that:

He is the President of Power TakeOff, Inc.;

That he is authorized to and does make this affidavit for Power TakeOff, Inc.;

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.

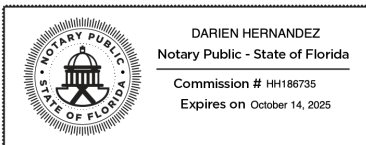
That the facts above set forth are true and correct to the best of his/her knowledge, information, and belief, and that he/she expects said Applicant to be able to prove the same at hearing.

Peter Widmer

Peter Widmer, President of Power TakeOff, Inc.

Signature of Affiant

Sworn and subscribed before me this 4th day of June, 2024.



[Signature]

Darien Hernandez, Online Notary Public

Signature of official administering oath

My commission expires: October 14th, 2025.

This notarial act was an online notarization
Produced a Colorado Driver's License

EXHIBIT A – PROOF OF FILING COMPLIANCE

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: Power TakeOff Inc.
Request Type: Certificate of Registration
Request No.: 019960026
Receipt No.: 634488
Filing Type: Foreign Business Corporation
Initial Filing Date: June 02, 2020
Status: Active

Issuance Date: August 04, 2023
File No: 0007067198

TO ALL WHOM THESE PRESENTS SHALL COME, GREETING:

I DO HEREBY CERTIFY THAT

Power TakeOff Inc.

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
Secretary of the Commonwealth

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

 Home

 Search

 Initial Forms

 Help

Business Search

As of 05/23/2024 we have processed all business filings received in our office through 05/14/2024.

Business Search Info: ▼

power takeoff 

Advanced ▼

Results: 1

Filing Information ⬇	Initial Filing Date ⬇	Status ⬇	Entity Type ⬇	Formed In ⬇	Address ⬇
Power TakeOff Inc. (7067198) ➤	06/02/2020	Active	Foreign Business Corporation	COLORADO	Registered Agents Inc



[Skip to main content](#)

EXHIBIT B – RESUMES

Kevin Martin

Kevin Martin is the Chief Executive Officer for Power TakeOff. From his sixteen 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>CEO</i>	May 2024 – present
<i>Co-CEO & COO</i>	January 2021 – April 2024
<i>Chief Operating Officer</i>	November 2011 – December 2020

- 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
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<i>City of Waterloo Waste Management, Green Bin Coordinator</i>	January 2008 – May 2008
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<i>IRT Consultants Environmental Scientist</i>	May 2007 – December 2007
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Education

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

Peter Widmer is the President of Power TakeOff responsible for Company strategy, business development and marketing. He also leads the Company's 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

President

May 2024 – present

Co-CEO & Chief Business Officer

January 2021 – April 2024

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

June 2012 – March 2013

Energy Analyst

Widmer International Consulting

October 2009 – May 2012

Principal

Mennonite Central Committee

August 2008 – August 2009

Director of Environmental & Energy Works Tanzania

Page 1 Solutions Marketing

May 2007 – July 2008

Account Manager

Education

Goshen College, BA

May 2007

Business

George Washington University, MBA

May 2013

Sustainability and Data Analytics

David Siddiqui

David Siddiqui is the Chief Operating Officer at Power TakeOff. In this role he leads the services delivery and design of the organization's offerings, along with management of regulatory affairs and piloting of new service and product offerings. Prior to joining Power TakeOff, David held several regulatory and market development roles with utility industry leaders Oracle and CLEARresult. David has actively served the industry and his community through volunteer Board Member positions with the Rising Sun center for Opportunity and Midwest Energy Efficiency Alliance (MEEA).

Power TakeOff

Chief Operating Officer

May 2024 – Present

- Manage the successful and on time delivery of Power TakeOff's core Virtual Commissioning® (VCx®) and Virtual SEM® (vSEM®) service offerings
- Oversee the organization's regulatory approach to supporting market development
- Lead the development of strategic plans for Power TakeOff's offerings

Oracle

Sr. Manager, Regulatory Affairs & Market Development

Aug. 2019 – Mar. 2024

CLEARresult

Director

Jul. 2014 – May 2017

Populus, LLC

CA Director of Business Development & Operations

July 2013 – July 2014

Ecology Action

Program Manager

Energy Upgrade Specialist

Aug. 2012 – March 2013

June 2011 – March 2012

Education

University of California, Berkeley, BS

Environmental Sciences

2011

Jamie Zynger

Jamie Zynger is the Vice President of Finance and Accounting at Power TakeOff. She leads the Company's financial management and reporting, including compliance with all federal and state requirements. Jamie also oversees the organization's third-party audit and compliance with US GAAP accounting practices. Prior to joining Power TakeOff, Jamie held related roles within the energy industry, most recently with Crusoe where she led the development of their accounting policies and procedures and was recognized as the Controller of the Year by third party accounting software vendor FloQast in 2023.

Power TakeOff

Vice President, Finance & Accounting

May 2024 – Present

- Finance
 - Lead the preparation and communication of all financial documents
 - Establish and monitor internal financial controls aligned with GAAP
- Accounting
 - Oversee compliance with all regulatory and tax filing requirements
 - Manage compliance with US GAAP practices, policies and procedures

Crusoe Energy Systems, LLC

Sr. Director of Accounting

Jan. 2023 – Jan. 2024

Controller

Feb. 2020 – Dec. 2023

Fintech Nexus

2018 – 2019

Director of Finance

MuscleSound

2017 – 2018

Controller

Techstars

2016 - 2017

Senior Accountant

Education

Northern Alberta Institute of Technology, BBA

2011

Accounting & Finance

CPA Canada

2013

Chartered Global Management Accounting

2017

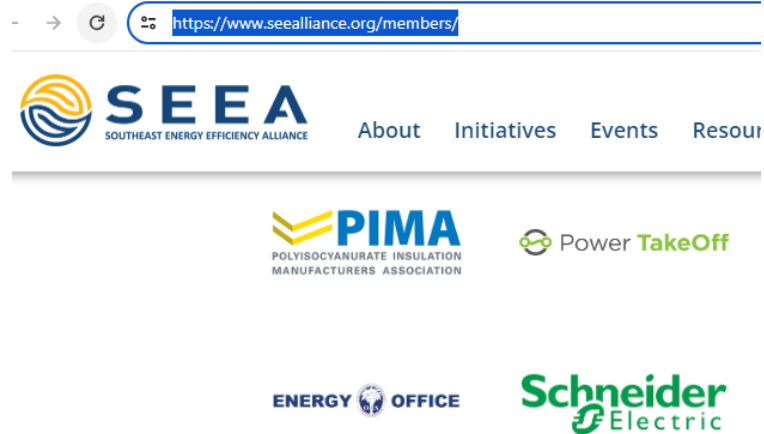
EXHIBIT C – CERTIFICATIONS

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. SEEA (Southeast Energy Efficiency Association)

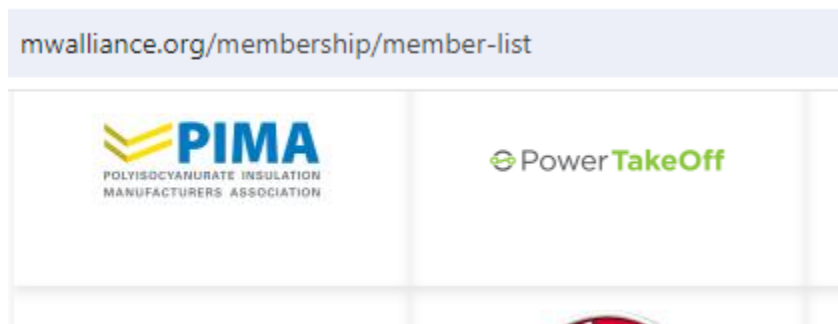
- <https://www.seealliance.org/members/>



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2. MEEA (Midwest Energy Efficiency Alliance)

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



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- Furthermore, Power TakeOff 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>

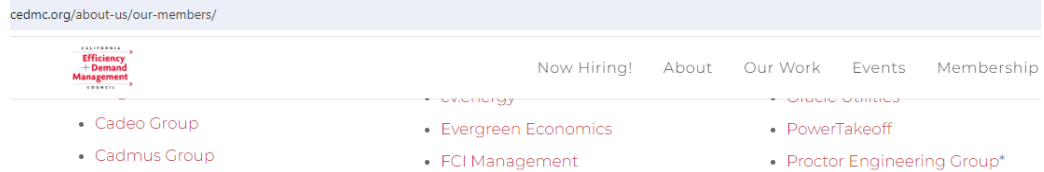
Power TakeOff, in Association With ComEd, Wins the MEEA Inspiring Efficiency Award for Innovation

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/>



4. SWEEP

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

SWEEP Allies 2024

- **ACEEE (American Council for an Energy-Efficient Economy)**
Alliance to Save Energy
American Chemistry Council
Bernhard
Cascade Energy
Center for Energy and Environment
City of Denver
CLEARresult
Daikin
Dandelion Energy

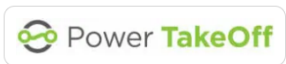
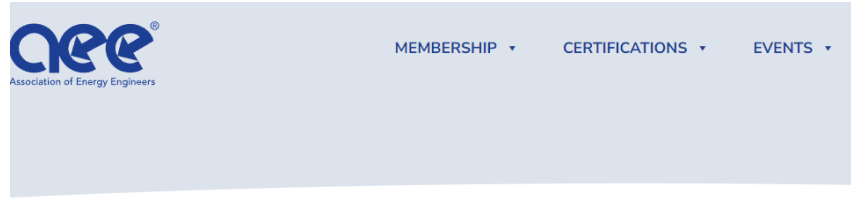
- **ICF**
Johns Manville
LG Air Conditioning
Michaels Energy
NAIMA (North Ame
Opinion Dynamics
Oracle Opower
Owens Corning
Pearl Certification
Power TakeOff

5. AESP (Association of Energy Services Professionals)

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

6. AEE (Association of Energy Engineers)

- <https://www.aeecenter.org/community/power-takeoff/>



Power TakeOff

Gold Level

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Silver Members



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 energy efficiency services under the DSM portfolio.
3. Ameren IL – 2020 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
4. United Illuminating – 2020 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
5. Puget Sound Energy – 2020 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.

6. MN Power – 2021 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
7. Delmarva Power – 2021 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
8. Pepco – 2021 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
9. Duquesne Light Company – 2021 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
10. Baltimore Gas & Electric – 2021 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
11. Consolidated Edison – 2022 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
12. Ameren MO – 2023 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
13. Salt River Project – 2023 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
14. PECO – 2023 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
15. FirstEnergy – 2024 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
16. SMECO – 2022 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
17. Tucson Electric Power – 2023 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.
18. Duke Energy – 2023 to present
 - Power TakeOff implements energy efficiency services under the DSM portfolio.

EXHIBIT D – INSURANCE COVERAGE



ADDITIONAL REMARKS SCHEDULE

AGENCY Willis Towers Watson Northeast, Inc.		NAMED INSURED Power TakeOff Inc PTO Holdco 1750 30th Street #420 Boulder, CO 80301	
POLICY NUMBER See Page 1		EFFECTIVE DATE: See Page 1	
CARRIER See Page 1	NAIC CODE See Page 1		

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
 FORM NUMBER: 25 FORM TITLE: Certificate of Liability Insurance

General Liability policy shall be Primary and Non-contributory with any other insurance in force for or which may be purchased by Additional Insureds, as required by written contract.

Waiver of Subrogation applies in favor of Additional Insureds with respects to General Liability, as required by written contract.

INSURER AFFORDING COVERAGE: Arch Specialty Insurance Company NAIC#: 21199
 POLICY NUMBER: C-4MFH-240349-CYBER-2023 EFF DATE: 11/01/2023 EXP DATE: 09/01/2024

TYPE OF INSURANCE:	LIMIT DESCRIPTION:	LIMIT AMOUNT:
Excess Cyber	Limit	\$5,000,000