



November 25, 2024

DATE OF DEPOSIT

Pennsylvania Public Utility Commission
400 North Street
Harrisburg, PA 17120
Attention: Rose Chiavetta, Secretary

NOV 25 2024

PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU

RE: Electric Generation/Natural Gas Supplier Licenses

Dear Ms. Chiavetta,

Please find enclosed our applications to become a gas and electricity broker as per the above, along with our respective application fees.

Should you have any questions, please contact me at your earliest convenience.

Sincerely,

Morley Shulman
Director of Compliance
American Wholesale Energy
morley.shulman@americanwholesaleenergy.com
1.855.347.0007, ext. 2474

Energy Solutions for Peace of Mind

BEFORE THE PENNSYLVANIA PUBLIC UTILITY COMMISSION

Application of American Wholesale Energy Inc., d/b/a _____, for approval to offer, render, furnish, or supply natural gas supply services as a(n) [as specified in item #4b below] 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 d/b/a fictitious name), primary address, web address, and telephone number of Applicant:

American Wholesale Energy Inc.
322 North Shore Drive
Building 1B, Suite 200
Pittsburgh, PA
15212
www.americanwholesaleenergy.com
Ph: 1-855-347-0007

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PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU

- 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.

Greg Carey
322 North Shore Drive
Building 1B, Suite 200
Pittsburgh, PA
15212
1-855-347-0007
Ph.: 1-855-347-0007
Fax: 1-855-247-8969

- 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.

Morley Shulman
Director of Compliance
322 North Shore Drive
Building 1B, Suite 200
Pittsburgh, PA
15212
1-855-347-0007

- 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.

George J. Eydt
Hodgson Russ LLP
22 Adelaide St. West
Toronto, ON
M5H 4E3
geydt@hodgsonruss.com
Ph.: 416-595-2671
Fax: 1-877-432-1626

- 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.

Morley Shulman
Director of Compliance
322 North Shore Drive
Building 1B, Suite 200
Pittsburgh, PA
15212
1-855-347-0007
Ph.: 1-855-347-0007, ext. 2474
Fax: 1-855-247-8969
Morley.shulman@americanwholesaleenergy.com

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, Form DSCB: 54-311.

or

X 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. § 412 relating to Department of State filing requirements.

or

The Applicant is a:

- domestic general partnership (*)
- domestic limited partnership (15 Pa.C.S. § 8621)
- foreign general or limited partnership (15 Pa.C.S. §§ 411 and 412)
- domestic limited liability partnership (15 Pa.C.S. §§ 8201 and 8221)
- foreign limited liability general partnership (15 Pa.C.S. §§ 411 and 412)
- foreign limited liability limited partnership (15 Pa.C.S. §§ 411 and 412)

- 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. §§ 411 and 412.

OR

The Applicant is a:

- domestic corporation (15 Pa.C.S. § 1308)
- foreign corporation (15 Pa.C.S. §§ 411 and 412)
- domestic limited liability company (15 Pa.C.S. § 8821)
- foreign limited liability company (15 Pa.C.S. §§ 411 and 412)
- Other (Describe):

- Provide proof of compliance with appropriate Department of State filing requirements as indicated above.

Attached.

- Provide the state in which the business is incorporated/organized/formed and provide a copy of the Applicant's charter documentation.

Attached.

- Give name and address of officers.

Tim Mulcahy, CEO
322 North Shore Drive
Building 1B, Suite 200
Pittsburgh, PA
15212

3. AFFILIATES AND PREDECESSORS

(both in state and out of state)

- a. **AFFILIATES:** Give name and address of any affiliates currently doing business and state whether the affiliates 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.

American Wholesale Energy does not have any affiliates.

- b. **PREDECESSORS:** Identify any predecessors of the Applicant and provide the names under which the Applicant has operated, including address, web address, and telephone number, if applicable. If the Applicant does not have any predecessors that have done business, explicitly state so.

American Wholesale Energy does not have any predecessors.

- c. **RELATED DOCKET NUMBERS:** Provide the Docket Numbers for any previous Pennsylvania PUC licenses for the Applicant, all affiliates, and any predecessors. If the Applicant does not have any related Docket Numbers, explicitly state so.

Our current docket # was A-2024-3050943

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)

OR

- X 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
- X Broker/Marketer engaged in the business of supplying natural gas services
 - X 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.

American Wholesale Energy will be acting as a broker for natural gas and will not be taking title to any supply.

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 | |

X All of the above

e. **CUSTOMERS:** Applicant proposes to provide services to:

- Residential Customers
- X Small Commercial Customers - (Less than 6,000 Mcf annually)
- X Large Commercial Customers - (6,000 Mcf or more annually)
- X Industrial Customers
- X 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 Licensing Requirements Applicable to Mixed Meter Scenarios Secretarial Letters served March 25, 2011, and July 3, 2013, at Docket No. M-2009-2082042.

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

American Wholesale Energy will market shortly after we receive our license.

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.

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.

American Wholesale Energy has no affiliates or predecessors nor have any persons listed in this application been the defendant in any criminal or civil proceedings within the last five years.

- b. **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.

American Wholesale Energy has no escalated actions or complaints and have never been previously registered with the Pennsylvania PUC.

- c. **SUMMARY:** If applicable; provide a statement as to the resolution or present status of any actions listed above. Additionally, provide details of any actions the applicant has undertaken that will prevent the items listed above from occurring if licensed in Pennsylvania.

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 Sections 1.57, 1.58, and 62.103(c) of the Commission's Regulations, 52 Pa. Code §§ 1.57, 1.58, and 62.103(c), 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 Small Business Advocate
Forum Place
555 Walnut Street, 1st Floor
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, 1.58, and 62.103(c) of the Commission's Regulations, 52 Pa. Code §§ 1.57, 1.58, and 62.103(c), 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.

<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. § 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.

Sent and received by the PAPUC

- 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.
 - 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.
 - 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.
 - Audited financial statements exhibiting accounts over a minimum two-year period.
 - Bank account statements (3-12 recent consecutive months), tax returns from the previous two years, or any other information that demonstrates Applicant's financial fitness.

Please see Appendix 7.b

- 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.

See Appendix 7.c for a guarantee from owner.

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

American Wholesale Energy will be acting strictly as a broker of natural gas. We will get paid directly by whichever retailer with whom the consumer signs.

- 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.

Greg Carey, CFO, will be acting as custodian for our accounting records.

Greg Carey
322 North Shore Drive
Building 1B, Suite 200
Pittsburgh, PA
15212
1-855-347-0007
Ph.: 1-855-347-0007
Fax: 1-855-247-8969

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.

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

Attached.

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.
- Summary and proof of licenses as a supplier of natural gas services in other states or jurisdictions.
- Type of customers and number of customers Applicant currently serves in other jurisdictions.
- 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.

American Wholesale Energy will be using some of the same key personnel that is being used for ONIT Energy Ltd. Appendix 8.a provides resumes for the key individuals.

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?

- Yes
 No

If yes, describe the Applicant's verification procedures.

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.

All sales will be regularly monitored via weekly audits. All customers will also receive a welcome call from our Customer Experience department to verify the details of the signed contract(s). In addition, all inside and outside sales agents will be required to complete full training and pass a certification test with a minimum 80% grade.

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.

Please see Appendix 8.e.

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.

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.

X 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.

X 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) and 52 Pa. Code § 62.112(a). Transferee will be required to file the appropriate licensing application.

X 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.

X 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.

X 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. §§ 4902, 4903, and 4904, relating to perjury and falsification in official matters.

X 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.

X 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.

X 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.
- 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.

12. **NEWSPAPER PUBLICATIONS**

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

All Applicants MUST include a Commission issued Docket Number in their publications. Docket Numbers are issued to new applicants when an application packet is submitted to the PUC's Secretary's Bureau. **Newspaper publications published without a Commission issued Docket No. will be rejected.** For more information, see 52 Pa. Code § 62.107.

DATE OF DEPOSIT

NOV 25 2024

Appendix A

APPLICATION AFFIDAVIT

PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU

[Commonwealth/State] of Pennsylvania _____ :

ss.

County of _____

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

[He/she is the CFO _____ (Office of Affiant) of American Wholesale Energy Inc. _____

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

That the Applicant herein American Wholesale Energy Inc. has the burden of producing information and supporting documentation demonstrating its technical and financial fitness to be licensed as an electric generation supplier pursuant to 68 Pa.C.S. § 2809 (b) and 52 Pa. Code § 54.37.

That the Applicant herein American Wholesale Energy Inc. has answered the questions on the application correctly, truthfully, and completely and provided supporting documentation as required.

That the Applicant herein American Wholesale Energy 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 American Wholesale Energy 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.



Signature of Affiant

Sworn and subscribed before me this 14 day of August, 2024.



Signature of official administering oath

My commission expires Does not expire _____.

DATE OF DEPOSIT

NOV 25 2024

Appendix B

PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU

OPERATIONS AFFIDAVIT

[Commonwealth/State] of Pennsylvania _____ :

: ss.

County of _____ :

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

[He/she is the CFO _____ (Office of Affiant) of American Wholesale
Energy Inc. _____ (Name of Applicant);]

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

That American Wholesale Energy Inc.____, 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 American Wholesale Energy Inc.____, the Applicant herein, asserts that [he/she/it] possesses the requisite technical, managerial, and financial fitness to render electric 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 American Wholesale Energy Inc.____, 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. 5, No. 2), known as the Tax Reform Code of 1971, 72 P.S. §§ 7101 et seq., and any tax imposed by Chapter 28 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 Gross Receipts and power 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).

As provided by 66 Pa.C.S. § 2810 (C)(6)(iv), 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 American Wholesale Energy Inc. _____, the Applicant herein, acknowledges that it has a statutory obligation to conform with 66 Pa.C.S. § 506, § 2807(c), § 2807(d)(2), § 2809(b) 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 Bureau of Public Liaison 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 Applicant

Sworn and subscribed before me this 14th day of August, 2024.



Signature of official administering oath

My commission expires Does not expire.

Appendix A

DATE OF DEPOSIT

APPLICATION AFFIDAVIT

NOV 25 2024

[Commonwealth/State] of Pennsylvania _____ :

PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU

ss.

County of _____ :

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

[He/she is the CFO _____ (Office of Affiant) of American Wholesale Energy Inc. _____

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

That the Applicant herein American Wholesale Energy Inc. ___ 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 68 Pa.C.S. § 2208 (c)(1) and 52 Pa. Code § 62.109(a).

That the Applicant herein American Wholesale Energy Inc. ___ has answered the questions on the application correctly, truthfully, and completely and provided supporting documentation as required.

That the Applicant herein American Wholesale Energy Inc. ___ acknowledges that it is under a duty to update information provided in answer to questions on this application and contained in supporting documents.

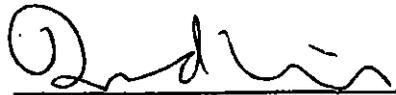
That the Applicant herein American Wholesale Energy Inc. ___ acknowledges that it is under a duty to supplement information provided in answer to questions on this application and contained in supporting documents as requested by the Commission.

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.



Signature of Affiant

Sworn and subscribed before me this 14 day of August, 2024.



Signature of official administering oath

My commission expires Does not expire.

Appendix B

DATE OF DEPOSIT

OPERATIONS AFFIDAVIT

NOV 25 2024

[Commonwealth/State] of Pennsylvania _____ :

PA PUBLIC UTILITY COMMISSION

SS. SECRETARY'S BUREAU

County of _____ :

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

[He/she is the CFO _____ (Office of Affiant) of American Wholesale Energy Inc. _____ (Name of Applicant);]

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

That American Wholesale Energy Inc. _____, 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 American Wholesale Energy Inc. _____, 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 American Wholesale Energy Inc. _____, the Applicant herein, acknowledges that failure to comply with any provision of Chapter 22 of the Public Utility Code or the rules, regulations, orders or directives of the Department of Revenue or of the Commission, including, but not limited to, engaging in anticompetitive behavior, shall be cause for the Commission to revoke the Applicant's license. See 66 Pa.C.S. § 2208(c)(2). 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 American Wholesale Energy Inc. _____, 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.

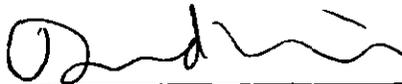
That the Applicant agrees to provide all consumer education materials and information in a timely manner as requested by the Office of Communications or other Commission bureaus. Materials and information requested may be analyzed by the Commission to meet obligations under applicable sections of the 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 14th day of August, 2024.



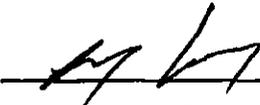
Signature of official administering oath

My commission expires Does not expire.

CERTIFICATION UNDER OATH

1. I, Greg Carey, hereby certify that I am the CFO of the Registrant and have
(Type or print name) *(title)*
been authorized to file this initial application and certification on behalf of the Registrant.
2. I hereby certify that I have carefully examined all of the statements contained in this initial application and in the attachments hereto and made a part hereof, that I have knowledge of the matters set forth herein, that all statements made and matters set forth herein are true and correct to the best of my knowledge, information, and belief and that I know of no material omission. I am aware that submitting false or misleading information in connection with this renewal application is grounds for revocation of license and may subject me, the Registrant and other responsible persons on behalf of the Registrant to penalties of perjury, as well as to other civil or criminal penalties.
3. I hereby certify that the Registrant agrees to comply with all standards, rules and regulations applicable to this registration.
4. I also certify that the Registrant shall provide such information as the Board or its staff shall require to assist the Board in making any determination concerning revocation, suspension, issuance or renewal of the registration pursuant to N.J.S.A. 48:3-81 (Section 32 of the Act).

Dated this 13 day of August, 2024 at Toronto.
(day) *(month)* *(year)* *(location)*

Signature: 
CFO
(title)

DATE OF DEPOSIT

NOV 25 2024

PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU

NOTARIZATION:





Delaware

The First State

Page 1

I, JEFFREY W. BULLOCK, SECRETARY OF STATE OF THE STATE OF DELAWARE, DO HEREBY CERTIFY THE ATTACHED IS A TRUE AND CORRECT COPY OF THE CERTIFICATE OF INCORPORATION OF "ONIT MARKETING SERVICES LTD.", FILED IN THIS OFFICE ON THE TWENTY-SEVENTH DAY OF MARCH, A.D. 2024, AT 1:25 O`CLOCK P.M.

DATE OF DEPOSIT

NOV 25 2024

PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU



3343793 8100
SR# 20241190935

You may verify this certificate online at corp.delaware.gov/authver.shtml


Jeffrey W. Bullock, Secretary of State

Authentication: 203130232
Date: 03-27-24

CERTIFICATE OF INCORPORATION

OF

ONIT MARKETING SERVICES LTD.

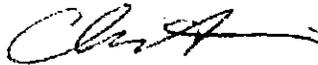
Under Section 102 of the General
Corporation Law of the State of Delaware

1. The name of the Corporation is Onit Marketing Services Ltd.
2. The address of the Corporation's registered office in the State of Delaware is 1521 Concord Pike #201, in the City of Wilmington, County of New Castle 19803. The name of the registered agent at such address is Corporate Creations Network Inc.
3. The purposes of the Corporation are to engage in any lawful act or activities for which corporations may be organized under the General Corporation Law of the State of Delaware.
4. The total number of shares of all classes of stock which the Corporation shall have authority to issue is 5,000 shares with a par value of \$0.0001 per share, all of which shall be common stock.
5. The name and mailing address of the sole incorporator are Alice K. Cheung, c/o Hodgson Russ LLP, 22 Adelaide Street West, Suite 2050, Bay-Adelaide Centre, East Tower, Toronto, Ontario, M5H 4E3, Canada.
6. In furtherance and not in limitation of the powers conferred by statute, the Board of Directors is expressly authorized to adopt, amend or repeal the by-laws of the Corporation.
7. Election of directors need not be by written ballot unless the by-laws of the Corporation shall so provide.

8. The Corporation reserves the right to amend, alter, change or repeal any provision contained in this Certificate of Incorporation, in the manner now or hereafter prescribed by statute, and all rights conferred upon stockholders herein are granted subject to this reservation.

9. To the extent permitted by the General Corporation Law of the State of Delaware (or any statute succeeding such law), as such law now exists or may hereafter be amended, no director of the Corporation shall be personally liable to the Corporation or its stockholders for monetary damages for any breach of fiduciary duty as a director occurring during the time this Paragraph 9 is in effect.

THE UNDERSIGNED, being the sole incorporator for the purpose of forming a Corporation pursuant to the General Corporation Law of the State of Delaware, does make this certificate, hereby declaring and certifying that this is her act and deed and the facts herein are true and, accordingly, has hereunto set her hand this 27th day of March, 2024.



Alice K. Cheung, Sole Incorporator

Delaware

The First State

Page 1

I, JEFFREY W. BULLOCK, SECRETARY OF STATE OF THE STATE OF DELAWARE, DO HEREBY CERTIFY THE ATTACHED IS A TRUE AND CORRECT COPY OF THE CERTIFICATE OF AMENDMENT OF "ONIT MARKETING SERVICES LTD.", CHANGING ITS NAME FROM "ONIT MARKETING SERVICES LTD." TO "AMERICAN WHOLESALE ENERGY INC.", FILED IN THIS OFFICE ON THE TENTH DAY OF JUNE, A.D. 2024, AT 10:15 O`CLOCK A.M.




Jeffrey W. Bullock, Secretary of State

3343793 8100
SR# 20242818810

Authentication: 203673355
Date: 06-10-24

You may verify this certificate online at corp.delaware.gov/authver.shtml

CERTIFICATE OF AMENDMENT
OF
CERTIFICATE OF INCORPORATION
BEFORE PAYMENT OF CAPITAL
OF
ONIT MARKETING SERVICES LTD.

I, the undersigned, being the sole incorporator of **ONIT MARKETING SERVICES LTD.**, a corporation organized and existing under and by virtue of the General Corporation Law of the State of Delaware,

DO HEREBY CERTIFY:

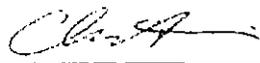
FIRST: That Article 1. of the Certificate of Incorporation be and it hereby is amended to read as follows:

1. The name of the Corporation is **American Wholesale Energy Inc.**

SECOND: That the corporation has not received any payment for any of its stock.

THIRD: That the amendment was duly adopted in accordance with the provisions of section 241 of the General Corporation Law of the State of Delaware.

IN WITNESS WHEREOF, I have signed this certificate this 10th day of June, 2024.



Alice K. Cheung, Sole Incorporator

September 25, 2024

DATE OF DEPOSIT

Greg Carey
American Wholesale Energy
322 North Shore Dr
Pittsburgh, PA 15212

NOV 25 2024

PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU

Dear Greg Carey:

We are pleased that American Wholesale Energy 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, American Wholesale Energy 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. American Wholesale Energy has indicated only brokering and consulting services will be provided. Therefore, we have determined at this time that American Wholesale Energy 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 American Wholesale Energy changes in the future, Columbia Gas might deem it appropriate to require American Wholesale Energy 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,

Kylia Davis

Kylia Davis
Manager of Choice and Transportation Support Services



PHILADELPHIA GAS WORKS

800 West Montgomery Avenue • Philadelphia, PA 19122

11/14/2024

Mr. Morley Shulman
322 North Shore Drive
Building 1B, Suite 200
Pittsburgh, PA 15212

morley.shulman@americanwholesaleenergy.com

RE: Security Requirement Bond for American Wholesale Energy.

Dear Mr. Shulman,

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

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

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

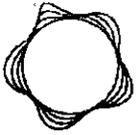
Sincerely,

A handwritten signature in black ink, appearing to read 'John Zuk', is written over a horizontal line.

John Zuk (Nov 14, 2024 11:35 EST)

JOHN C. ZUK
Sr. Vice President, Gas Management

/dls



pecoSM

AN EXELON COMPANY

November 14, 2024

Morley Shulman, Director of Compliance
American Wholesale Energy
200-21 East State Street
Columbus, OH 43215

Re: Bonding Requirements

Dear Morley Shulman:

PECO is aware that American Wholesale Energy 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 American Wholesale Energy could be required to provide to PECO a bond or other acceptable financial security in an amount that PECO determines to be appropriate. American Wholesale Energy 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 American Wholesale Energy 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 American Wholesale Energy or the creditworthiness requirement for PECO's exposure to American Wholesale Energy changes in the future, PECO reserves the right to require American Wholesale Energy 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

Suzette Adams
Sr Manager, Gas Supply and Transportation
2301 Market Street
Philadelphia, PA 19103



VALLEY ENERGY

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

November 14, 2024

VIA EMAIL

Morley Shulman, Director of Compliance
American Wholesale Energy
200-21 E. State St
Columbus, OH 43215
morley.shulman@americanwholesaleenergy.com

RE: American Wholesale Energy

Dear Mr. Shulman:

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

Pursuant to 66 Pa.C.S. § 2208(c), an applicant for a natural gas supplier license must furnish security to each utility where it will do business to ensure the supplier's financial responsibility. To this end, Valley Energy periodically will perform a credit review and analysis of American Wholesale Energy when it begins to serve customers on Valley Energy's system. Valley Energy will determine whether American Wholesale Energy must post a security based on the credit review, the types of customers served, the volumes expected to be delivered for those customers and the other rules in Valley Energy's Supplier Tariff. At this time, no security is being requested; however, if the services provided change in the future, we reserve the right to require security from American Wholesale Energy as deemed appropriate.

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

Sincerely,

Edward E. Rogers
President & CEO

EER/km

cc: J. Beale, Valley Energy



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

VIA E-MAIL

November 14, 2024

American Wholesale Energy
322 North Shore Drive
Building 1B, Suite 200
Pittsburgh, PA 15212

ATTENTION: Morley Shulman, Director of Compliance
Morley.shulman@americanwholesaleenergy.com

RE: American Wholesale Energy
Application to Serve as a Natural Gas Broker

Dear Mr. Shulman,

Based on your assertion that American Wholesale Energy ("American Wholesale") is applying with the State of Pennsylvania to operate as a natural gas broker/marketer, UGI Utilities, Inc.-Gas Division ("UGIU") has concluded that American Wholesale will not need to post security with UGIU. This is based on the declaration that American Wholesale 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 American Wholesale 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,

Sherry Epler
Senior Manager
Tariff & Supplier Administration

SE/rks



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

November 14, 2024

Mr. Greg Carey
CFO
American Wholesale Energy
322 North Shore Dr, Building 1B, Ste 200
Pittsburgh, PA 15212

Dear Mr. Carey:

We are pleased that American Wholesale Energy 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 American Wholesale Energy is not currently serving customers on the Peoples systems, we have determined at this time that American Wholesale Energy 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 American Wholesale Energy'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,

Carol Scanlon
Manager, Rates
Peoples Natural Gas Company LLC

Cc: Stephen Kelly
Mina Speicher



National Fuel®

November 22, 2024

Attention: Greg Carey, CFO
American Wholesale Energy
322 North Shore Drive, Building 1B, Suite 200
Pittsburgh, PA 15212

Dear Greg,

National Fuel Gas Distribution Corporation ("NFGDC") is aware American Wholesale Energy ("AWE") 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, AWE must furnish acceptable security to each utility where AWE will do business. As such, under its tariff, NFGDC could require AWE 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 AWE intends only to provide natural gas aggregating, brokering and consulting services at this time. You have stated that, in performing these services, AWE 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, AWE does not need to post a bond or other form of security to operate in its service territory. However, if the services provided by AWE change in the future, NFGDC reserves the right to require security from AWE as it deems appropriate.

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

Yours truly,

Jason Allen
Transportation Services Department

APPENDIX 8.e

DATE OF DEPOSIT

NOV 25 2024

PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU

ZAHID RAHMAN

ENTREPRENEURSHIP • LEADERSHIP • TECHNICAL EXPERT

PROFILE

An exceptional leader with 15 years of vision, strategic planning, process optimization, and technical expertise. Contributions resulted in company-wide success in various industries and team sizes using passion, creativity, advanced analytics, performance improvements, and increased profitability. Led teams and multiple companies to rapid but sustainable growth towards path for IPO, and exits valued over \$700M USD combined. Superior communication skills to effectively integrate human capital assets, technology, and innovative to resolve critical business needs. Influential advisor capable of creating effective partnerships with executives and stakeholders to achieve desired strategic outcomes. Comfortable and confident in making tough decisions and defending them through progressive discussions. The exceptional ability for envisioning the "bigger picture" and devising strategies to align all organizational components to achieve successful outcomes.

BUSINESS TRANSFORMATION & IT COMPETENCIES

- Entrepreneurial Mindset
- Strategic Planning
- Process Optimization
- Team Building
- Department/Team Management
- Financial Forecasts & Budgeting
- Enterprise IT Solutions
- Mobile & Web Development
- Client & Vendor Relations
- Project Management
- Product Manager
- ITIL & Agile Methodologies

EXPERIENCE

SENIOR VICE PRESIDENT OF OPERATIONS - ONIT ENERGY - 2 BLOOR ST. W, TORONTO (2013-PRESENT)

Led all operations of Ontario's fastest growing B2B Energy retailer. Also known as Ontario Wholesale Energy (OWE), ONIT resells natural gas and electricity with \$125M annual revenue and growing rapidly.

As the SVP, I was third-in-command in the organization, focused on company vision, establishing corporate culture of innovation, seeking business opportunities, solutions-oriented.

KEY CONTRIBUTIONS /ACHIEVEMENTS

- Leader of the senior management team and heavily influence organization's long-term & short-term strategy
- Oversee and direct day-to-day operations of the company: Operations, Finance, I.T. systems, I.T. development, Legal & Compliance, HR, and Customer Service
- Leader of the senior management team and heavily influence organization's long-term & short-term strategy
- Influenced organization to pursue expansion to United States

MANAGER OF INNOVATION - CONSTELLATION SOFTWARE (\$46B TSE: CSU) - MARKHAM (2022-2023)

Constellation Software is publicly traded company on the Toronto Stock Exchange worth \$46 Billion. It's Canada's second largest tech company and top 25 in the world in market cap (higher than companies like Rogers and Air Canada). The company is also one of the fastest growing in valuation (12x in 10 years). Their success is due to innovation and focus on product development.

As Manager of Innovation, my role focus is on directly leading my business unit (and the company) to invent and develop new

offerings, influence mergers and acquisitions, and act as Product Manager.
TORONTO, ON ■ ZAHID@VISIONCOMPUTING.CA ■ 647-308-5491

KEY CONTRIBUTIONS /ACHIEVEMENTS

- Responsible for leading innovation of new product offerings
- Propose new offerings to senior management with business plan and financial forecasting
- Create budgets and stay on quarterly and yearly targets
- Hiring of software development team, sales, marketing, and customer service
- Review and analyze competitors, and influence in M & As if it's more feasible to acquire companies with existing products versus inventing new product
- In short tenure, already succeeded in solving problems facing company for years and released respective products

CHIEF EXECUTIVE OFFICER & CO-FOUNDER - DIEM APP - MISSISSAUGA, ON (2019-2022)

Co-founded, developed, and expanded startup mobile app company's flagship app, Diem, to be Canada's top instant home services app, and top 10 globally, with over 125,000 downloads, 30,000 customers, 25+ cities in the U.S. and Canada including Los Angeles, New York, San Francisco, Washington, Toronto and more.

Diem was founded in 2017, with 3 other partners to solve the problem of limited time for performing everyday household tasks by the working class. We built a robust platform for customers and workers utilizing technology that was accessible, quick, convenient, and cost-effective. Diem was originally self-funded, and launched in January 2019. Since then, we grew rapidly through great branding, marketing, hiring, and customer service. The Canadian team consists of 4 co-founders, 3 investors, and with 12-member operations team overseas.

KEY CONTRIBUTIONS /ACHIEVEMENTS

- Successfully grew a startup from scratch to \$7M market valuation in 3 years, with multiple rounds of capital raises
- Lead bootstrapped startup app company to #1 home services app in Canada, and top 10 in the world
- Received multiple offers of acquisition from multiple parties in excess of \$3M
- Successfully opened an operations centre overseas (IT development & customer service) to 12+ members
- Leading from conceptualization, to development of app in-house CRM, marketing, operations, finance, and legal
- Fully hands-on from conceptualization of the app, created UI/UX designs, to the development, and maintenance
- Closely worked with development team; tech stack of iOS Swift, Java, Kotlin, Mongo DB, Firebase NoSQL, Customer.io, Zapier
- Created and optimized budgets & forecasts, pitch decks, and presented to investors in VCs, and angel networks
- Creative marketing campaigns to build 30k monthly traffic through SEO, & SEM (Google Ads, Facebook, Instagram, YouTube)
- Set up processes & systems for hiring, customer services, and development for business to be self-running

VICE PRESIDENT OF OPERATIONS - ONIT ENERGY - 2 BLOOR ST. W, TORONTO, ON (2014-2019)

Led all operations of Ontario's fastest growing B2B Energy retailer. Also known as Ontario Wholesale Energy (OWE), ONIT resells natural gas and electricity with \$75M annual revenue.

As the VP, I was third-in-command in the organization, with 8 direct reports (directors of all operational departments) and 32 indirect reports. Reporting to, and working closely with the CEO (Tim Mulcahy, and IPO'ed Canada's largest Energy retailer with peak valuation of \$2B), and the President, I was directly involved in the company's direction and vision. Responsibilities included long-term strategy, goals, policies, and procedures for OWE, and played direct role in the information technology department software, security, infrastructure, hardware, and support of the over 200 users, and the development of in-house ERP, CRM, and mobile applications on Android.

KEY CONTRIBUTIONS /ACHIEVEMENTS

- Third in-command in the organization; reporting to CEO, & President for this \$100M company
- Awarded company's first Top Gun Award for leadership and operational excellence
- Oversee and direct day-to-day operations of the company: Operations, Finance, I.T. systems, I.T. development, Legal & Compliance, HR, and Customer Service (responsible for 40 staff members)
- Leader of the senior management team and heavily influence organization's long-term & short-term strategy

- Lead organization through severe industry government regulations (Bill 112 effective 2017) where billion-dollar competitors left the Ontario market. Along with COO, I created & implemented the SEP program to counter against regulations, and it us to become the Ontario leader in B2B retail energy
- Heavily involved in the direction and vision of the organization, ensuring financial and strategic viability
- Determine short-term and long-term deficiencies throughout all departments then address accordingly
- Prepared financial forecasts, statistics, analysis, budgets, and vendor relations
- Fully hands-on with IT systems (security, network, systems, phone systems): web applications (.NET & MS-SQL) and mobile applications (Android Java); in-house CRM and billing systems
- Hands-on with legal & compliance, regulations, customer onboarding, billing, commissions, sales cycles
- Served as Director of Operations from May 2014 to October 2016 before being promoted to VP

DIRECTOR OF I.T. - TRUESTAR HEALTH - 55 ST. CLAIR W., TORONTO, ON (2013-2014)

Truostar had an ahead-of-its-time technology platform for health coaching & weight loss management. It also produced award-winning health products like vitamins & supplements, and sold them online. It grew it's database to close to 1 million users, & over \$30M annual sales before being acquired by an Arizona-based competitor.

- Led corporate wide I.T. transformation, collaborating with multiple business and technology stake holders
- Played significant role in corporate re-branding, and new business model that resulted in 800% YoY growth
- Led information technology planning for organization including budgets, projects, trends, and past evaluations
- Reported directly to the CEO; liaise with senior-level management on major projects
- Member of Executive Team; final call on I.T. expenditures and web development direction, and I.T. infrastructure
- Responsible for I.T. development of in-house e-commerce, CRM, ERP; servers, network, security, VOIP, VMs
- Play an integral part of short-term and long-term corporate strategic planning and direction

MANAGER OF I.T. - TRUESTAR HEALTH / PAYBRIGHT / UWEIGHTLOSS, TORONTO, ON (2011-2013)

Managed the I.T. interests of an organization with multiple businesses relating to health care and weight loss. Truostar was the producer of the vitamins & supplements with a cutting-edge health web coaching platform. U Weight Loss was the store front (clinics) across North America selling products and providing weight loss coaching. Paybright (formerly Healthsmart Financial) provided a web-based platform for consumers to efficiently pay for weight loss and other health services on monthly plans.

- Led the I.T. of very successful group of companies in the early stages during rapid growth (Uweightloss and Paybright was ultimately acquired for \$300M+ USD)
- Manage corporate I.T. department of 12 member I.T. team including Database Administrators, Web Developers, Mobile App Developers, Graphics Designers, Desktop Support, Network Administrator, ERP Specialist
- Oversee the day-to-day operations of the company's I.T. including staff, web development, applications, systems, network, security, infrastructure, mail, hardware, phone system including budgets and vendor management

SR. NETWORK ADMINISTRATOR - TRUESTAR HEALTH / UWEIGHTLOSS, TORONTO, ON (2010-2011)

Joined stagnant, but highly funded, technology platform and health products provider, Truostar, to transform their aging I.T. infrastructure that was limiting their growth. Excelled and promoted within company for next 5 years.

- Supported the infrastructure of organization's 3 business entities in a period of rapid growth (about from \$20M in 2009 to \$50M in 2010 annual revenue), from 30 locations across Canada to 70 across Canada and United States
- Planning, deployment, and maintenance of corporate I.T. infrastructure including 80+ servers, firewalls, security, switches (Cisco & HP), backup, 400+ PCs system-wide, 900+ users across 75 locations throughout North America
- Virtualized significant portion of infrastructure to VM Ware ESXi including MS SQL 2008 R2 with fail-over clustering, MS Exchange 2010, Network Load Balancing, MS SharePoint 2010, IIS, Windows Server 2008 R2
- Led in the transformation of the company's I.T. hardware, systems, and security from outdated to leading-edge including document libraries (Sharepoint), web servers, mail servers, Blackberry Servers, VOIP phone systems (MiTel)

SR. SYSTEMS ADMINISTRATOR - ENVIRO CORP (148 CSE LN) - 3085 #1 (2009-2010)

Linamar Corporation is a \$4-Billion publicly traded Canadian manufacturing company that operates worldwide. It is Canada's second-largest automobile parts manufacturer. Linamar manufactures and supplies products to automotive (including Ford, GM, Mercedes, BMW) and industrial markets and has 25,000 employees

- Planning, deployment, and maintenance of corporate I.T. infrastructure including 80+ servers, firewalls, security, switches (Cisco & HP) , backup, 400+ PCs system-wide, 1000+ users across 75 locations throughout North America
- Virtualized significant portion of infrastructure to VM Ware ESXi including MS SQL 2008 R2 with fail-over clustering, MS Exchange 2010, Network Load Balancing, MS SharePoint 2010, IIS, Windows Server 2008 R2

I.T. COORDINATOR - CITY OF BRAMPTON (BRAMPTON LIBRARY) - BRAMPTON, ON (2006-2009)

Joined City of Brampton as the youngest management staff to transform the city's library I.T. department, who had poor reputation of technical competence and user experience. Through my tenor, it went from the worst preceived department, to one of the most-liked and best performing.

- Manage and maintain the entire I.T. service department of its staff, 30+ servers, 350 PCs, MS Exchange Servers, SharePoint, websites, databases (SQL and Oracle), backups, VOIP telephone system, and network infrastructure of Cisco and Nortel equipment and fiber optic network between locations
- Responsible for all the technology of the library system, 6 branches, active 100,000 customers, and all I.T. staff
- Played leading role in company migrating it's backbone ILS (ERP) system after 8 years that modernized the library into RFID, automated physical book sorting, and integrated online booking system

EDUCATION

UNIVERSITY OF TORONTO – ECONOMICS - BACHELOR'S DEGREE - 1998-2003

PRODUCT MANAGEMENT CERTIFICATION - PRAGMATIC INSTITUTE - 2022

MICROSOFT CERTIFIED SYSTEMS ENGINEER - 2004

REFERENCES

To be provided upon request

Greg Carey, CPA, CA
gregcareyca@outlook.com
<http://ca.linkedin.com/pub/greg-carey/58/602/654/>

Career Summary

Chief Financial Officer (CFO)

ONIT Energy Ltd., Toronto, Oct 2014 – present

Canadian Water Savings Inc., Toronto, Apr 2022 – present

American Wholesale Energy Inc., Ohio, 2024 – present

- Member of senior management. Overall management of company finances and accounting operations.
- Reporting directly to the CEO and the Board of Directors.
- Five direct reports.

Director of Finance

Ontario Research and Innovation Optical Network, Toronto, Jan 2014 – present

- Overall management of company finances and accounting operations. Reviewed and updated financial policies and procedures, internal controls and compliance.
- Consolidated revenue and inter-department budget forecasts, with monthly and quarterly reporting to senior management and the Board of Directors.
- Two direct reports, partial oversight of IT department.

Consultant – Business Analyst

TD Bank Group, Toronto, Feb – Dec 2013 (contract role)

- Consolidated project finances, including budget and forecast review for up to 80 underlying streams involved in a major IT system build of new credit card segment. Assisted with forecasting process for 2014 fiscal year.

Financial Compliance Officer

Focus Investment Ltd., Hamilton, Bermuda, July 2002 – May 2012

SEC-registered investment manager with AUM of USD \$1 billion at peak level.

- Member of management reporting directly to the COO and CFO. Financial controller of accounting operations, financial reporting and regulatory filing.
- Created and managed the compliance department, covering anti-money laundering (AML/ATF) regulations, know-your-client regulations, background screening and investor relations.
- One indirect report.

Senior Associate

PricewaterhouseCoopers, Hamilton, Bermuda, September 2000 – June 2002

Manager

Collins Barrow, Red Deer, Alberta, October 1996 – August 2000

Professional Certification and Education

Chartered Accountant, Alberta, 1999

Bachelor of Commerce with Distinction, University of Alberta, 1996

LORI KEITH

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LEADER OF OPERATIONAL EXCELLENCE

Results Driven Executive | Creative Problem Solver | Optimizer of Performance

Strategic, transformational Leader and driver of operational excellence. Proven ability to maintain customer focus while achieving operational and financial goals. A creative problem solver with strength in improving profitability, growing revenue, enhancing quality of service, yielding productivity improvements, and cultivating customer relations. Recognized for ability to set vision, execute strategy, build teams and inspire employees to achieve desired results.

Expertise in:

- Strategic Planning and Execution
- Operations (B2B, B2C, NPO)
- Continuous Improvement
- OKR and KPI Development
- Logistics and Supply Chain Optimization
- Sales, Marketing and Expansion
- Regulatory Compliance
- Customer and Vendor Management

PROFESSIONAL EXPERIENCE

ONIT Energy Ltd. (Parent Company)

2021-Present

A privately held, entrepreneurial and regulated ESG company that provides industry leading energy alternatives and water consumption savings to qualifying commercial accounts in Canada and the USA.

Vice President Operations (ONIT entities – OWE/WWE/AWE/CWS/AWS)

Responsible for setting and execution of operations strategy, regulatory compliance, operational fulfillment and the development and implementation of innovative technological solutions. Led 5 direct reports and 50+ employees.

- Critical member of leadership team that led ONIT to back-to-back record setting years (2022/23) for revenue and profit through sales execution, realization of operational efficiencies, targeted customer retention strategies and supply chain optimization.
- Successfully led the Western Canadian expansion for energy solutions, overseeing all organizational elements, scaling existing infrastructure and driving organic growth (10%).
- Expertly planned and executed the launch of Canadian Water Savings company working collaboratively with stakeholders to bring complimentary product offerings to a 40K customer base. Confidently led national and international expansion leveraging established practices and learnings.
- Achieved unprecedented industry regulatory compliance with a compliant rate of 0.3%. Revamped internal audit, training and protocols to support.
- Re-engineered all critical operational processes, developed and implemented KPI's for continuous improvement and drove technological innovation and DevOps best practices to deliver improved tool and superior technological solutions.

Cardtronics Canada

2020 -2021

The world's largest ATM operator, providing convenient access to cash and financial services through leading operations and innovations, serving merchants, financial institutions and consumers globally.

Vice President Operations, Canada (Role eliminated due to COVID organizational restructuring)

Responsible for setting and execution of operations strategy, delivery of best-in-class ATM availability, supply chain, regulatory compliance, and Canadian P&L responsibility. Led 4 direct reports and 50+ employees through cultural transformation and change.

- Restored confidence in operational service delivery, creating culture of collaboration, customer focus and results orientation. Led by example, built accountable teams, delivering unprecedented performance and attaining all key goals.
- Developed and implemented the first operational KPI's, building a continuous improvement (CI) mindset, maximizing ATM uptime, transactional revenue and customer satisfaction. Key improvements included first visit resolution > 93% and improvements to restoral times (20%).
- Strategically executed on financials during COVID-19, developing new profitable service lines and insourcing select services to reduce costs while increasing resource utilization and leading essential service providers courageously through uncertain times.
- Successfully planned and deployed the country's largest ATM replacement project in record time, effectively collaborating with all stakeholders and achieving key success criteria.

Lenworth Building Services Ltd.

2017-2019

Leader in the provision of customized commercial logistics solutions for industrial facilities to ensure they are safe, compliant and efficient. 2018-2020 recipient of "Growth 500" Award and recognized as one of Canada's fastest growing companies.

Executive (Sales/Marketing/Operations)

Interim assignment reporting to the CEO and COO, responsible for Sales, Marketing and Operations department activities, driving profitable revenue growth, enhancing the customer experience through operational excellence, and ensuring a compliant, safe and productive workforce.

- Skillfully recruited and developed a high performing team of sales, service, and administrative professionals, increasing sales pipeline, closing rate activities, and improving the employee and customer experience. Strategic product line revenue increased by 25% annually.
- Championed national expansion through alliances and partnerships. increased preventative maintenance revenue by 88%, positively improving customer equipment uptime, performance, and profitability.
- Redesigned all major processes, implemented OKR's and KPI's, increasing customer focus, productivity, accountability, and outcomes.
- Championed the development of the CRM and digital marketing strategy to enhance brand, improve website click through rate (CTR) and lead conversion. Led e-compliance, vendor prequalification and certification.

Certified General Accountants of Ontario (CGA Ontario)

2009-2012

Self-governing regulatory body that grants exclusive rights to the CGA designation and controls the professional standards, conduct and discipline of its students and members.

Vice President, Student Services (Operations)

Responsible for quality delivery of the educational program while ensuring academic standards and regulatory policies are maintained for over 9,000 diverse students.

- Redesigned critical sales and operations processes to dramatically improve student recruitment, retention and admission to membership. Student enrolment volume improved by 10% during tenure after a prior 3-year decline while new members increased by 5%.
- Leveraged technology to develop and deliver the first virtual classroom within an online learning environment and shared services, increasing student success, admission to membership and contribution margin (10%). Operations lead for CRM planning and implementation.
- Pioneered the first departmental dashboard and association scorecard, significantly improving management visibility, employee engagement, customer service focus and key outcomes.
- Represented CGA Ontario on Board of Director and national committees, effectively influencing stakeholders on policy related to academic standards, quality, education delivery and technology.

Reliance Home Comfort, a Division of Union Energy**2005-2009**

A leader in providing essential HVAC, water heater and security services to residential and commercial customers across Canada.

Director of Operations

Responsible for setting and execution of operations strategy, P&L, service fidelity and customer satisfaction. Led 8 direct reports and 150+ unionized technicians and installers.

- Increased productivity and service capacity by 25% during peak season, allowing 100% of critical calls to be responded to the same day - a company first.
- Enhanced profitability with \$3.2M reduction in capital investment over prior year. Annual water heater repair activity improved >10 %, reduced tank replacements and spending by 42%. Supply chain improvements yielded additional \$1.1M savings.
- Developed and implemented first ever sales targets for unionized service technicians, organically achieving strategic company protection plan targets and increasing qualified lead generation.
- Implemented industry leading "One and Done" Program, completing service calls within a single incident, improving customer satisfaction ratings of >90% and Installer productivity by >40%.

NCR Canada Ltd.**1990-2005**

The world's leading enterprise technology provider of ATM solutions.

Director of Business Operations, Canada**2002-2005**

Responsible for national ATM availability, attainment of OKR's and KPI's, strategic partnerships and \$125M P&L. Oversight of all division departmental lead (8), 600+ employees and Country GM alternative.

- Led unprecedented attainment of global service and customer metrics during tenure. Customer response metrics improved 30%. Restore metrics improved 15% with customer satisfaction ratings >85%.
- Improved First Visit service call resolution to 89% (8% improvement), positively impacting client equipment availability and resource and asset utilization.
- Improved gross margin by >\$3.5M (8%) through salary and wages reductions achieved through technician capacity improvements, insource of strategic sources and the effective management of third parties.

Previous NCR Canada Ltd. experience included the following roles:

Director of Business Development
Director of Logistics and Supply Chain (\$35M)
Manager of Marketing and Deployment
Manager of Opportunity, Risk Assessment and Pricing
Manager of Sales
Business and Financial Consultant
Manager of Pricing and Administration
Financial Analyst

EDUCATION

Bachelor of Commerce (Major: Finance and Marketing), McMaster University, Hamilton, ON

Niagara Institute, Leadership Development Program – Advanced Business Leadership

Lean Six Sigma Canada – Certification

MORLEY SHULMAN

402-10 Gatineau Drive • Thornhill, Ontario L4J 0L2
416.830.7360 • morley@morleyshulman.com

SENIOR SALES & OPERATIONS MANAGEMENT

Inside / Outside Sales • Revenue Growth • Strategic Planning

Highly successful business leader with comprehensive background managing sales and customer service strategies. Proven track record of branding and revenue growth for companies with North American footprint. Adept in budget oversight, merchandising, and cost controls focused on service and company expansion. Expertise transforming company business strategies into action and achievement. Skilled training and professional development of staff to realize exemplary performance and service standards.

CORE COMPETENCIES:

- Sales Leadership
 - Driving Brand Equity
 - Business-to-Business
 - Business-to-Consumer
 - Vendor Relationships
 - Market Expansion
 - Customer Service
 - Product Promotion
 - Negotiations & Contracts
-

PROFESSIONAL EXPERIENCE

ONTARIO WHOLESALE ENERGY
Director of Compliance

2014 - present

O.W.E. is a leading retailer of wholesale energy in Ontario, Manitoba and Saskatchewan.

- Manage all Customer Service, Compliance & regulatory affairs while ensuring all Inside and Outside Agents are constantly kept up to date.
- Work with the Ontario Energy Board to ensure that client complaints are resolved as quickly and as amicably as possible..
- Ensure all Inside and Outside Agents are compliant with all regulatory requirements
- Responsible for regular reporting to the Ontario Energy Board
- Assist with training all Inside and Outside Agents regarding Compliance and regulatory requirements.

TRUESTAR HEALTH – Toronto, Ontario
Vice President, Customer Service

2003 to 2013

Manage all business operations and logistics for one of the leading health and nutrition companies in North America. Coordinate sales and marketing teams with multiple customer accounts, launching strategies to meet company performance targets. Strengthen relationships with all business partners and clients. Conduct contract negotiations and due diligence. Guided new business and project development from inception to finish. Develop all procedures and policies for department training, scripting and performance metrics.

- Driving force behind creation of department, sustaining momentum and maintaining high productivity during downsizing period.

...continued...

- Negotiated terms with two acclaimed professional authors to represent company with no financial commitment from corporate offices.
- Responsible for building connections listing company in The Comparative Guide to Nutritional Supplements; tied for #1 rank in North America.
- Led training initiatives for Customer Service Department on outbound and inbound sales; wrote all scripting for campaigns.
- Chief strategist behind successful retention program with 60+% improvement overall.
- Built effective sales affiliate program worth thousands of dollars at zero cost to company.
- At peak of employment levels, managed 21 staff members including two Supervisors and two Team Leaders.
- Strong contributor to business planning leading to steady revenue and profit growth year over year.

YORK CONSULTING – Toronto, Ontario

2001 - 2003

General Manager

Oversaw operations for B2B telemarketing firm delivering outbound call-center services for mostly high tech sector. In charge of seven member sales team. Provided leadership to expand market share, identify growth opportunities, and create strategies to improve service management. Set performance benchmarks and ensured quality of customer contact. Mined business opportunities for lead generation, conducted market research, and guided training programs for staff.

- Created productive team atmosphere and focused on accountability and philosophy of reaching win-win outcomes.
- Designed and launched business strategies that lead to growth of 30% above target.

MARKET CONNECTIONS – Toronto, Ontario

1995 - 2000

Director, Inside Sales

Allocated business resources and triggered business development for privately-owned, direct communications company specializing in production and distribution of client newsletters for financial industry. Promoted brand awareness and customer satisfaction. Trained specialists and senior managers to use computer systems and newsletter programs.

- Entrusted with ensuring key client relations with high-profile companies, including Allstate, Manulife, Merrill Lynch, The Guardian, Prudential and The MONY Group, among others.
- Designed marketing collateral for direct mail programs and tradeshow; led to increases of 25% to 50% above target.
- Heavily involved in development of proprietary software for marketing and sales programs that streamlined operations and allowed optimized performance.

STN-SMART TALK NETWORK – Markham, Ontario

1993 - 1994

Senior Training Supervisor

Coordinated training for Canada's largest residential long distance reseller. Managed 120 Telemarketers as well as four senior and six junior supervisors. Liaised between Call Centre Director and 10 Call Centre Supervisors.

- Wrote and tested all call-campaign scripts.

- Helped develop off-site Equal Access call campaign with a 75% PIC rate from start to finish.
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EDUCATIONAL BACKGROUND

YORK UNIVERSITY – Toronto, Ontario

Bachelor of Arts (Honours)

Double Major: Mass Communications/ Political Science

