



November 19, 2024

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

Re: eIQdigital, Inc.
Application For Electric Generation Supplier License (Broker)

Dear Secretary Chiavetta:

Attached for filing is the application of eIQdigital, Inc. for an Electric Generation Supplier License (broker).

The following information will be sent via overnight mail:

Appendix I - Tax Certification Statement (Confidential)
Attachment C - Financial Information (Confidential)
Filing fee
Original bond

If you have any questions regarding the attached, please contact me.

Thank you,

Krista Glentzer
Regulatory Manager

cc: Dan Sullivan - eIQdigital, Inc.

BEFORE THE PENNSYLVANIA PUBLIC UTILITY COMMISSION

Application of eIQdigital, Inc., d/b/a Personalized.Energy, for approval to offer, render, furnish, or supply electricity or electric generation services as a(n) broker/marketer to the public in the Commonwealth of Pennsylvania (Pennsylvania).

To the Pennsylvania Public Utility Commission:

1. IDENTIFICATION AND CONTACT INFORMATION

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

eIQdigital, Inc. d/b/a Personalized.Energy
2700 Post Oak Boulevard, 21st Floor
Houston, TX 77056
www.eiqdigital.com
(410) 350-9531

- 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.

Paracorp, Inc.
600 North Second Street
Harrisburg, PA 17101
(888) 272-5449

- 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.

Dan Sullivan
President and Chief Executive Officer
2700 Post Oak Boulevard, 21st Floor
Houston, TX 77056
(410) 350-9531
dan@eiqdigital.com

- 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.

eIQdigital, Inc. will not be using an attorney.

- e. **CONTACTS FOR CONSUMER SERVICE AND COMPLAINTS: (Required of ALL Applicants)** 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 Electric 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 EGSs.

Dan Sullivan
President and Chief Executive Officer
2700 Post Oak Boulevard, 21st Floor
Houston, TX 77056
(410) 350-9531
dan@eiqdigital.com

Sui Wang
Director of Customer Success
2700 Post Oak Boulevard, 21st Floor
Houston, TX 77056
(855) 347-3444
sui.wang@eiqdigital.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

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

elQdigital, Inc. was formed in the state of Delaware.

See Attachment B

- Give name and address of officers.

Dan Sullivan
 President and Chief Executive Officer
 2700 Post Oak Boulevard, 21st Floor
 Houston, TX 77056

David Chang
 Chief Digital Officer
 2700 Post Oak Boulevard, 21st Floor
 Houston, TX 77056

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.

eIQdigital, Inc. does not have any affiliates currently doing business in Pennsylvania or any affiliates that are currently applying to do business in Pennsylvania.

- 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.

eIQdigital, Inc. does not have any predecessors that have done business in Pennsylvania.

- 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.

eIQdigital, Inc. does not have any related docket numbers in Pennsylvania.

4. OPERATIONS

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

Definitions

- Supplier – an entity that sells electricity to end-use customers utilizing the jurisdictional transmission and distribution facilities of an EDC.
- Aggregator - an entity that purchases electric energy and takes title to electric energy as an intermediary for sale to retail customers.
- Broker/Marketer - an entity that acts as an intermediary in the sale and purchase of electric energy but does not take title to electric energy.

- The Applicant is presently doing business in Pennsylvania as a

- municipal electric corporation
- electric cooperative
- local gas distribution company
- provider of electric generation, transmission or distribution services
- broker/marketer engaged in the business of supplying electricity services
- Other; Identify the nature of service being rendered.

or

- The Applicant is not presently doing business in Pennsylvania.

- b. APPLICANT'S PROPOSED OPERATIONS:** The Applicant proposes to operate as a *(may check multiple)*:

- Supplier of electricity
- Aggregator engaged in the business of supplying electricity

- Broker/Marketer engaged in the business of supplying electricity services
 - Check here to verify that your organization will not be taking title to the electricity nor will you be making payments for customers.
- Electric Cooperative and supplier of electric power
- Other (Describe):

c. **PROPOSED SERVICES:** Describe in detail the electric services or the electric generation services which the Applicant proposes to offer.

eIQdigital will provide residential retail and commercial/industrial electricity brokerage services through its digital platforms. eIQdigital will work with specified energy suppliers in the PA market to present plans that best match the customers' usage levels and budget needs through an automated, highly transparent rate and cost comparison process.

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

- | | |
|---|--|
| <input type="checkbox"/> Citizens' Electric | <input type="checkbox"/> Pike |
| <input type="checkbox"/> Duquesne Light | <input type="checkbox"/> PPL |
| <input type="checkbox"/> Met-Ed | <input type="checkbox"/> UGI Utilities |
| <input type="checkbox"/> PECO | <input type="checkbox"/> Wellsboro |
| <input type="checkbox"/> Penelec | <input type="checkbox"/> West Penn |
| <input type="checkbox"/> Penn Power | |
- Entire Commonwealth of PA

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

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

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

eIQdigital proposes to actively market within the Commonwealth upon Commission approval of this application.

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.

Neither eIQdigital, Inc., nor any affiliate or predecessor, nor any person identified in this application, has been or is currently the defendant of a criminal or civil proceeding within the last five (5) years.

- b. **CUSTOMER/REGULATORY/PROSECUTORY ACTIONS:** Identify all formal or escalated actions or complaints, in the Commonwealth of Pennsylvania or any state, 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.

eIQdigital, Inc. has no actions or complaints to list.

- c. **SUMMARY:** Provide a statement as to the resolution or present status of any proceedings or 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.

Not applicable

6. PROOF OF SERVICE

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

- a. **STATUTORY AGENCIES:** Pursuant to Sections 1.57, 1.58, and 54.32(d) of the Commission's Regulations, 52 Pa. Code §§ 1.57, 1.58, and 54.32(d), provide proof of service of a signed and verified Application with attachments on the following:

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

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

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

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

Office of Small Business Advocate
 Forum Place
 555 Walnut Street, 1st Floor
 Harrisburg, PA 17101

- b. **EDCs:** Pursuant to Sections 1.57, 1.58, and 54.32(d) of the Commission's Regulations, 52 Pa. Code §§ 1.57, 1.58, and 54.32(d), provide Proof of Service of the Application and attachments upon each Electric Distribution Company the Applicant proposes 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 EDC is as follows.

<p>Citizens' Electric Company: Citizens' Electric Company Attn: EGS Coordination 1775 Industrial Boulevard Lewisburg, PA 17837</p>	<p>Duquesne Light Company: Regulatory Affairs Duquesne Light Company 411 Seventh Street, MD 16-4 Pittsburgh, PA 15219</p>
<p>Met-Ed, Penelec, and Penn Power: Legal Department First Energy 2800 Pottsville Pike Reading PA, 19612</p>	<p>PECO: Manager Energy Acquisition PECO Energy Company 2301 Market Street Philadelphia, PA 19101-8699</p>
<p>Pike County Light & Power Company: Vice President – Energy Supply Corning Natural Gas Holding Corporation 330 West William Street Corning, NY 14830</p>	<p>PPL: Office of General Counsel Attn: Kimberly A. Klock PPL Two North Ninth Street (GENTW3) Allentown, PA 18101-1179</p>
<p>UGI: UGI Utilities, Inc. Attn: Rates Dept. – Choice Coordinator 1 UGI Drive Denver, PA 17517</p>	<p>Wellsboro Electric Company: Wellsboro Electric Company Attn: EGS Coordination 33 Austin Street P. O. Box 138 Wellsboro, PA 16901</p>
<p>West Penn Power: Legal Department West Penn Power d/b/a Allegheny Power 800 Cabin Hill Drive Greensburg, PA 15601-1689</p>	

7. FINANCIAL FITNESS

- a. **FINANCIAL SECURITY:** In accordance with 66 Pa.C.S. § 2809(c)(1)(i) and 52 Pa. Code § 54.40(a), the Applicant is required to file a bond or other instrument to ensure its financial responsibilities and obligations as an EGS. Therefore, the Applicant is...
- Furnishing the **ORIGINAL** of an initial bond, letter of credit or proof of bonding to the Commission in the amount of \$250,000.
 - Furnishing the **ORIGINAL** of another initial security for Commission approval, to ensure financial responsibility, such as a parental guarantee, in the amount of \$250,000.
 - For Marketers and Brokers** - Filing for a modification to the \$250,000 requirement and furnishing the **ORIGINAL** of an initial bond, letter of credit or proof of bonding to the Commission in the amount of \$10,000. Applicant is required to provide information supporting an amount less than \$250,000. Such supporting information must include indication that the Applicant will not take title to electricity and will not pay electricity bills on behalf of its customers. Further details for modification may be described as well.

CRITICAL BONDING NOTES:

Applicant is required to maintain a bond or other financial instrument the entire time it maintains an EGS license with the Commonwealth of Pennsylvania. If Applicant's security instrument is not continuous, Applicant **MUST** submit a Rider, Amendment, or Continuation Certificate annually based on the expiration date of its security instrument.

At least sixty days (60) prior to the security instrument's expiration date, EGS suppliers should email pc-puc-tus-energy@pagov.onmicrosoft.com or call (717)783-5242 to determine the appropriate bonding amount based on a percentage of suppliers gross receipts resulting from the sale of generated electricity consumed in Pennsylvania. Once the amount has been determined, suppliers should overnight the updated security instrument(s) at least thirty (30) days prior to the expiration date to ensure adequate time for staff review and approval of the security instrument(s).

Template versions of a continuous bond (preferred), fixed-term bond, continuous letter of credit, and parental guarantee are attached at Appendix E, F, G, & H, respectively. Applicant's security must follow language from these examples, and must include the unmodified language outlined in Appendix D. Any deviation from these examples must be identified in the application and may not be acceptable to the Commission.

- **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: **See Attachment C**
- 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.

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

Not applicable.

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

eIQdigital will receive a commission fee from energy suppliers for whom eIQdigital initiates and succeeds in a customer plan enrollment. Broker fees will be paid directly by the energy supplier to eIQdigital via ACH payment typically on a monthly basis. Fees are only paid by the supplier for verified successful customer enrollments with the energy supplier.

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

Teresa Chang
 VP of Finance and Accounting
 2700 Post Oak Boulevard, 21st Floor
 Houston, TX 77056
 (626) 322-5280
teresa.chang@eiqdigital.com

e. **TAXATION:** Complete the TAX CERTIFICATION STATEMENT attached as Appendix I 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.

Based on the conditions listed on Pennsylvania Sales Tax Registration website page, eIQdigital does not require a sales tax certificate to conduct business in Pennsylvania. eIQdigital has no office, employees or physical property or warehousing in the state nor do we meet any other conditions listed on the page.

8. TECHNICAL FITNESS:

To ensure that the present quality and availability of service provided by electric utilities 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: **See Attachment D**

- Applicant's previous experience in the electricity industry.
- Summary and proof of licenses as a supplier of electric 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.
- Documentation of membership in PJM, ECAR, MAAC, other regional reliability councils, or any other membership or certification that is deemed appropriate to justify competency to operate as an EGS within the Commonwealth.
- Any other information appropriate to ensure the technical capabilities of the Applicant.

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

- Internal – Applicant will use its own internal resources/employees for marketing
- External EGS – Applicant will contract with a PUC LICENSED EGS broker/marketer
- Affiliate – Applicant will use a NON-EGS affiliate marketing company and or individuals.
- External Third-Party – Applicant will contract with a NON-EGS third party marketing company and or individuals
- 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.

elQdigital, Inc. performs all marketing activities in-house without the use of outside agencies, call centers or subcontractors. Currently, all sales and marketing activities are done on our digital platforms, currently only Personalized.Energy, with the management team having complete control of messaging and functionality. Since it is a public website, there is complete public and regulatory transparency into our sales and marketing efforts. We have no plans to depart from this approach in the future.

- 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.

Dan Sullivan
President and Chief Executive Officer

David Chang
Chief Product Officer

See Attachment E

- f. **FERC FILING:** Applicant has:

- Filed an Application with the Federal Energy Regulatory Commission to be a Power Marketer.
- Received approval from FERC to be a Power Marketer at Docket or Case Number _____.
- Not applicable

9. DISCLOSURE STATEMENTS:

Disclosure Statements: If proposing to serve Residential and/or Small Commercial (under 25 kW) Customers, provide a Residential and/or Small Commercial disclosure statement. A sample disclosure statement is provided as Appendix J to this Application.

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

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

10. VERIFICATIONS, ACKNOWLEDGEMENTS, AND AGREEMENTS

- a. **PJM LOAD SERVING ENTITY REQUIREMENT:** As a prospective EGS, the applicant understands that those EGSs which provide retail electric supply service (i.e. takes title to electricity) must provide either:
- proof of registration as a PJM Load Serving Entity (LSE), or
 - proof of a contractual arrangement with a registered PJM LSE that facilitates the retail electricity services of the EGS.

The Applicant understands that compliance with this requirement must be filed within 120 days of the Applicant receiving a license. As well, the Applicant understands that compliance with this requirement may be filed with this instant application.

(Select only one of the following)

- AGREED** - Applicant has included compliance with this requirement in the instant application, labeled in correspondence with this section (10).
 - AGREED** - Applicant will provide compliance with this requirement within 120 days of receiving its license
 - ACKNOWLEDGED** - Applicant is not proposing to provide retail electric supply service at this time, and therefore is not presently obligated to provide such information
- b. **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 § 54.43, as well as any future amendments.

AGREED

- c. **REPORTING REQUIREMENTS:** Applicant agrees to provide the following information to the Commission or the Department of Revenue, as appropriate:
- **Retail Electricity Choice Activity Reports:** The regulations at 52 Pa. Code §§ 54.201–54.204 require that all active EGSs report sales activity information. An EGS will file an annual report reporting for customer groups defined by annual usage. Reports must be filed using the appropriate report form that may be obtained from the PUC's Secretary's Bureau or the forms officer, or may be down-loaded from the PUC's internet web site.
 - **Reports of Gross Receipts:** Applicant shall report its Pennsylvania intrastate gross receipts to the Commission on a quarterly and year to date basis no later than 30 days following the end of the quarter.
 - **The Treasurer or other appropriate officer of Applicant shall transmit to the Department of Revenue by March 15, an annual report, and under oath or affirmation, of the amount of gross receipts received by Applicant during the prior calendar year.**
 - **Net Metering Reports:** Applicant shall be responsible to report any Net Metering per the Standards on http://www.puc.pa.gov/consumer_info/electricity/alternative_energy.aspx. Scroll down to the Net Metering Standards Section.

- Applicant shall report to the Commission the percentages of total electricity supplied by each fuel source on an annual basis per 52 Pa. Code § 54.39(b)(4).
- Applicant will be required to meet periodic reporting requirements as may be issued by the Commission to fulfill the Commission's duty under Chapter 28 of the Public Utility Code, 66 Pa.C.S. Chapt. 28, pertaining to reliability and to inform the Governor and Legislature of the progress of the transition to a fully competitive electric market.

AGREED

- d. **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. § 2809(D) and 52 Pa. Code § 54.41(a). Transferee will be required to file the appropriate licensing application.

AGREED

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

ACKNOWLEDGED

- f. **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 § 54.34.

AGREED

- g. **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.

AGREED

- h. **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 § 54.34.

AGREED

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

AGREED

- j. **Electronic Data Interchange:** The Applicant acknowledges the Electronic Data Interchange (EDI) requirements and the relevant contacts for each EDC, as listed at Appendix M.

AGREED

- k. **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

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 reliability protocols of the North American Electric Reliability Council, the appropriate regional reliability council(s), and the Commission, and that you agree to comply with the operational requirements of the control area(s) within which you provide retail service. 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 § 54.35.

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

The chart below dictates which newspapers are necessary for each EDC. For example, an applicant that wants to operate in Penn Power would need to run ads in both The Erie Times-News and the Pittsburgh Post-Gazette. If the applicant is proposing to serve the entire Commonwealth, please file proof of publication in all seven newspapers.

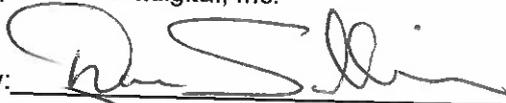
The only acceptable verification of this requirement is with Notarized Proofs of Publication, which may be requested from each newspaper and **must be supplied to the Commission before the applicant is licensed.**

	Erie Times-News	Harrisburg Patriot-News	Philadelphia Daily News or Philadelphia Inquirer	Pittsburgh Post-Gazette	Scranton Times-Tribune	Williamsport Sun-Gazette	Johnstown Tribune-Democrat
Citizens' Electric						X	
Duquesne				X			
Met Ed		X	X		X		
PECO			X				
Penelec	X	X			X	X	X
Penn Power	X			X			
Pike					X		
PPL		X	X		X	X	
UGI					X		
Wellsboro						X	
West Penn		X		X		X	X
Entire Commonwealth	X	X	X	X	X	X	X

(Newspaper Publication Templates are provided at Appendices K and L)

13. SIGNATURE

Applicant: eIQdigital, Inc.

By: 
 Title: President & CEO

14. CHECKLIST

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

Applicant: eIQdigital, Inc.

Applicant's Use	Signature	
	Filing Fee (CERTIFIED CHECK OR MONEY ORDER ONLY)	
	Application Affidavit	
	Operations Affidavit	
	Bond, Letter of Credit, or Parental/Affiliate Guarantee	
	Tax Certification Statement	
	Commonwealth Department of State Verification	
	Certificate of Service	

PUC Secretary's Bureau Use

Appendix A

APPLICATION AFFIDAVIT

[Commonwealth/State] of Texas :

ss.

County of Harris :

Dan Sullivan, Affiant, being duly sworn/affirmed according to law, deposes and says that:

He is the President and Chief Executive Officer of eIQdigital, Inc.;

That he is authorized to and does make this affidavit for said Applicant;

That the Applicant herein eIQdigital, 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 66 Pa.C.S. § 2809 (b) and 52 Pa. Code § 54.37.

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

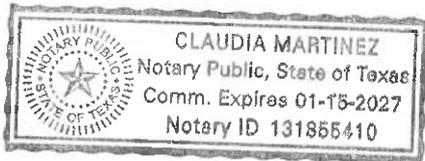
That the Applicant herein eIQdigital, Inc. acknowledges that it is under a duty to update information provided in answer to questions on this application and contained in supporting documents.

That the Applicant herein eIQdigital, 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 knowledge, information, and belief, and that he expects said Applicant to be able to prove the same at hearing.

[Signature]
Signature of Affiant

Sworn and subscribed before me this 02nd day of August, 2024.



[Signature]
Signature of official administering oath

My commission expires 01-15-2027.

Appendix B

OPERATIONS AFFIDAVIT

[Commonwealth/State] of Texas :

ss.

County of Harris :

Dan Sullivan, Affiant, being duly sworn/affirmed according to law, deposes and says that:

He is the President and Chief Executive Officer of eIQdigital, Inc.;

That he is authorized to and does make this affidavit for said Applicant;

That eIQdigital, Inc., the Applicant herein, acknowledges that 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 eIQdigital, 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 eIQdigital, 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. 6, 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 eIQdigital, 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.

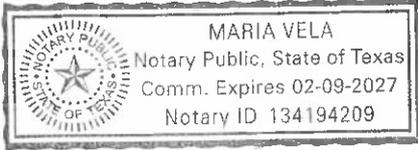
That the Applicant agrees to provide all consumer education materials and information in a timely manner as requested by the Bureau of Public Liaison or other Commission bureaus. Materials and information requested may be analyzed by the Commission to meet obligations under applicable sections of the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

Sworn and subscribed before me this 3rd day of August, 2024.



Signature of official administering oath

My commission expires 02/09/2027.

Appendix C

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

Example CERTIFICATE OF SERVICE

On this the 14th day of November 2024, I certify that a true and correct copy of the foregoing application form for licensing within the Commonwealth of Pennsylvania as an Electric Generation Supplier and all **NON-CONFIDENTIAL** attachments have been served, as either a hardcopy or a searchable PDF version on a cd-rom or a USB flash drive, upon the following:

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

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

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

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

Office of Small Business Advocate
Forum Place
555 Walnut Street, 1st Floor
Harrisburg, PA 17101

Vice President – Energy Supply
Corning Natural Gas Holding Corporation
330 West William Street
Corning, NY 14830

Legal Department
West Penn Power d/b/a Allegheny Power
800 Cabin Hill Drive
Greensburg, PA 15601-1689

Manager Energy Acquisition
PECO Energy Company
2301 Market Street
Philadelphia, PA 19101-8699

Regulatory Affairs
Duquesne Light Company
411 Seventh Street, MD 16-4
Pittsburgh, PA 15219

Office of General Counsel
Attn: Kimberly A. Klock
PPL
Two North Ninth Street (GENTW3)
Allentown, PA 18101-1179

Legal Department
First Energy
2800 Pottsville Pike
Reading PA, 19612

UGI Utilities, Inc.
Attn: Rates Dept. – Choice Coordinator
1 UGI Drive
Denver, PA 17517

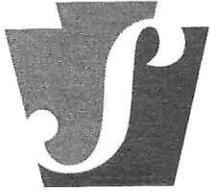
Citizens' Electric Company
Attn: EGS Coordination
1775 Industrial Boulevard
Lewisburg, PA 17837

Wellsboro Electric Company
Attn: EGS Coordination
33 Austin Street
P. O. Box 138
Wellsboro, PA 16901



Dan Sullivan, President and CEO
elQdigital, Inc.

Attachment A
Department of State Filings



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

May 24, 2023

Paracorp Incorporated
600 NORTH SECOND STREET
HARRISBURG, PA 17101

Entity Name: eIQDigital, Inc.
Entity File Date: May 24, 2023
Entity Number: 0013446104
Filing Type: Foreign Business Corporation

The Bureau of Corporations and Charitable Organizations is happy to send your filed document. The Bureau is here to serve you and we would like to thank you for doing business in Pennsylvania.

Thank you for registering with the Department of State to do business in Pennsylvania. Like many other businesses, you may have employees, sell taxable products, or provide a taxable service to consumers in Pennsylvania. Please visit www.pa100.state.pa.us to register for business taxes with the Department of Revenue and the Department of Labor and Industry. You may also visit www.Business.pa.gov to find resources for businesses through all stages of development.

Beginning in 2024, annual reports are required for all domestic filing entities, limited liability general partnerships and registered foreign associations. More information will be forthcoming from the Bureau. However, to ensure that you receive notice of how and when to make annual reports, keep all information on file with the Bureau up-to-date, particularly registered office address.



0013446104



COMMONWEALTH OF PENNSYLVANIA
 Department of State
 Bureau of Corporations and Charitable Organizations
 PO Box 8722
 Harrisburg, Pennsylvania 17105-8722
FOREIGN REGISTRATION STATEMENT
 Fee: \$250

Pennsylvania Department of State

-FILED-

File #: 0013446104
 Date Filed: 5/24/2023

B0569-7306 05/24/2023 8:50 AM Received by Pennsylvania Department of State

DSCB:15- 412 (rev. 2/2017)

In compliance with the requirements of 15 Pa.C.S. § 412 (relating to foreign registration statement), the undersigned foreign association hereby states that:

Foreign Business Type Filing type	Foreign Business Corporation	
Association Name The full and proper name of the foreign association as registered in its jurisdiction of formation is Business name in Pennsylvania	eIQDigital, Inc. eIQDigital, Inc.	
Effective Date The filing shall be effective when filed with the Department of State		
Additional Information Jurisdiction of Formation Select one of the following	DELAWARE The association may not have series.	
The street address of the association's principal office. Principal Office Address	2700 POST OAK BLVD 21ST FLOOR HOUSTON, TX 77056	
The mailing address of the association's principal office. Mailing Address	2700 POST OAK BLVD 21ST FLOOR HOUSTON, TX 77056	
Home Jurisdiction Addresses Select one	The association's home jurisdiction does not require the association to maintain a street and mailing address in that jurisdiction.	
Registered Office The name of the commercial registered office provider and the county of venue is Paracorp Incorporated Commercial Registered Office Provider Venue and Publication County	DAUPHIN	
Additional provisions, if any Additional provisions		
Electronic Signature IN TESTIMONY WHEREOF, the above-named association has caused this Foreign Registration Statement to be signed by a duly authorized representative		
Full Name	Title	Date
Dan Sullivan	President	05/24/2023

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

Entity Name: elQDigital, Inc.
Jurisdiction: DELAWARE
Entity No.: 0013446104
Entity Type: Foreign Business Corporation

Issuance Date: 05/24/2023
Receipt No.: 000532879
Certificate No.: 015795325

Document Listing

Image No.	Date Filed	Effective Date	Filing Description	No. of Pages
B0569-7306	05/24/2023	05/24/2023	Initial Filing	1

** **** * ***** ***** End of list ***** ***** **** **

I, Albert Schmidt, Acting Secretary of the Commonwealth of Pennsylvania, do hereby certify that the attached document(s) referenced above are true and correct copies and were filed in this office on the date(s) indicated above.



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 cursive script, appearing to read "Albert Schmidt".

ALBERT SCHMIDT

Acting Secretary of the Commonwealth

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

Attachment B
Formation Documents

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 "EIQDIGITAL, INC.", FILED IN THIS OFFICE ON THE NINTH DAY OF MARCH, A.D. 2023, AT 10:21 O'CLOCK A.M.




Jeffrey W. Bullock, Secretary of State

7339941 8100
SR# 20230923153

Authentication: 202889468
Date: 03-10-23

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

**CERTIFICATE OF INCORPORATION
OF
EIQDIGITAL, INC.**

ARTICLE I

The name of the corporation is eIQdigital, Inc. (the "**Company**").

ARTICLE II

The address of the registered office of the Company in the State of Delaware is 2140 South Dupont Highway, Camden, Kent County, Delaware 19934, and the name of the registered agent is Paracorp Incorporated.

ARTICLE III

The purpose of the Company is to engage in any lawful act or activity for which corporations may be organized under the Delaware General Corporation Law as the same exists or may hereafter be amended (the "**DGCL**").

ARTICLE IV

The total number of shares of Common Stock the Company has authority to issue is 10,000,000, with a par value of \$0.001 per share.

ARTICLE V

The name and mailing address of the incorporator is Joshua M. Hayes, 701 Corporate Center Dr Suite 250, Raleigh, Wake County, NC 27607.

ARTICLE VI

The Board of Directors of the Company (the "**Board**") has the power to adopt, amend or repeal the Bylaws of the Company.

ARTICLE VII

Elections of members of the Board may be, but are not required to be, by written ballot.

ARTICLE VIII

No member of the Board shall have personal liability arising out of an action whether by or in the right of the Company or otherwise for monetary damages for breach of fiduciary duty as a member of the Board; provided, however, that the foregoing shall not limit or eliminate the liability of a member of the Board (i) for any breach of such member's duty of loyalty to the Company or its stockholders, (ii) for acts or omissions not in good faith or which involve intentional misconduct or a knowing violation of law, (iii) under Section 174 of the DGCL or any successor provision, (iv) for any transaction from which such member of the Board derived an

improper personal benefit, or (v) acts or omissions occurring prior to the date of the effectiveness of this provision.

Furthermore, notwithstanding the foregoing provision, if the DGCL is amended or enacted to permit further limitation or elimination of the personal liability of the director, the personal liability of the members of the Board shall be limited or eliminated to the fullest extent permitted by the applicable law.

This provision shall not affect any provision permitted under the DGCL, in this Certificate of Incorporation, or in the Bylaws or any contract or resolution of the Company indemnifying or agreeing to indemnify a member of the Board against personal liability. Any repeal or modification of this provision shall not adversely affect any limitation hereunder on the personal liability of any member of the Board with respect to acts or omissions occurring prior to such repeal or modification.

ARTICLE IX

Except as provided in Article VIII above, the Company 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.

[Remainder of Page Intentionally Left Blank]

IN WITNESS WHEREOF, the undersigned, as the sole incorporator of the Company, has executed this Certificate of Incorporation on March 9, 2023.



Joshua M. Hayes, Esq.
Incorporator

Attachment C
Financials

CONFIDENTIAL - NOT FOR PUBLIC DISCLOSURE

Attachment D

Technical Fitness

EIQhome.com, and its home energy management and shopping platforms launched in 2020 in the Texas market. With a mission to simplify energy management and empower consumers, EIQhome aimed to make energy shopping and decision-making effortless and stress-free. It provides users with personalized energy plans based on their usage patterns and allows them to monitor and manage their energy costs and usage through an intuitive interface.

As the company grew, the holding company eIQdigital, Inc. was incorporated in March 2023 as an AI-first climate tech leader that focuses on driving digital transformation and sustainable energy transition building upon the success of EIQhome.

As eIQdigital evolved, it realized the need to leverage its technological capabilities beyond the consumer-facing platform. This led to the development of the PowerLego API set, a collection of powerful APIs that provide various functionalities related to energy market scanning, data access, address validation, load profiling, bill reading, and more. These APIs became the backbone of technology resulting in a SaaS business model offering digital solutions for energy suppliers and brokers.

eIQdigital, with its forward-looking digital initiatives, is on a mission to streamline and improve the electricity plan selection experience for residential consumers. Our proposal entails the following foundational pillars:

- **Digital Interface for Consumers:**
 - Platform Availability: We will introduce a digital interface, accessible both via a dedicated website and a mobile application.
 - Functionality: This interface will serve as a hub where residential consumers can browse, compare, and select electricity plans tailored to their usage patterns.
 - Real-Time Updates: eIQdigital ensures that the platform's offerings are always up-to-date, drawing from live data feeds from suppliers through secure API connections.
- **Enrollment Process:**
 - Data Gathering: Post-selection of an electricity plan, the consumer will input essential data, strictly in line with PUC regulations. This includes but isn't limited to their name, residential address, and account particulars.
 - Transmission Mechanism: This data, once entered, will be securely conveyed to the corresponding energy supplier in real-time, ensuring immediate action on the supplier's end.
- **Collaboration with Suppliers:**
 - Dynamic Plan Display: By integrating with supplier APIs, eIQdigital's platform will showcase the most current electricity plans, ensuring consumers get the best and most relevant options.
 - Post-Selection Handover: After eIQdigital forwards consumer data, the supplier will activate their standard enrollment protocols, ensuring consumers are integrated without disruptions.
- **Assured Data Safety:**

- Security Protocols: Recognizing the critical importance of data privacy, eIQdigital commits to rigorous data protection standards. We strictly adhere to PCI, PII, and NPI regulations, ensuring the utmost security of consumer information at all stages.
- Transparency: eIQdigital maintains open lines of communication with the PUC, updating the commission on any significant operational changes, especially those that might impact data security or consumer rights.

In summary, eIQdigital is determined to provide residential consumers with an intuitive, safe, and efficient mechanism to explore and enroll in electricity plans. Our operations have been molded to meet the benchmarks set by the PUC, prioritizing transparency, consumer welfare, reliability and data security.

ATTACHMENT E OFFICERS

Dan Sullivan, President and CEO, dan@eiqdigital.com, 410.350.9531

David Chang, Chief Product Officer, david@eiqdigital.com, 410.206.3568

Resume for Dan Sullivan

Dan Sullivan, a seasoned leader with over three decades of business experience and more than 20 years of Retail Energy experience, that prepared him well for the President and CEO role at eIQdigital. His career encompasses Competitive Retail Energy, Consumer Packaged Goods, Technology and Strategic Consulting.

Key Milestones:

- **eIQdigital, INC/eIQhome, LLC, Houston, TX (2020 - Present):** As President and CEO, Dan launched eIQhome and its Home Energy Management and Energy Brokerage Platform, which has subsequently become a subsidiary of eIQdigital. The platform was dedicated to bringing a personalized energy shopping experience to residential customers while driving the digital transformation of the energy industry and contributing to the world's transition to cleaner, more sustainable energy sources.
- **NextEra Energy, Inc., Houston, TX (2018 - 2019):** As Director of Digital Marketing, Dan crafted and executed the launch of PowerWizard.com, a pioneering home energy shopping platform. His innovative digital and traditional marketing strategies culminated in a successful rollout of the platform. [L] [SEP]
- **LifeEnergy, Houston, TX (2016 - 2017):** Dan provided need leadership for this struggling energy retailer with responsibilities spanning Sales, Marketing, Customer Care, and Retention.
- **Nextility Power and Gas, Washington, DC (2014 - 2016):** As General Manager, Dan pioneered breakthrough technologies and business models that elevated the retail energy brokerage landscape for Small and Medium Businesses.
- **Switch Energy Partners, Norwalk, CT (2013 - 2014):** A founding executive team member, Dan contributed significantly to the establishment of a residential retail energy provider. His strategic efforts across Sales, Marketing, and Market Development was instrumental in navigating a competitive landscape. [L] [SEP]
- **Direct Energy Business, Pittsburgh, PA (2012 - 2013):** Dan's leadership transitioned Direct Energy Business's marketing from communications-focused to customer-focused, aligning marketing strategies with business goals for SMB and C&I customers across all deregulated markets.
- **Constellation Energy, Baltimore, Maryland (2003 - 2008):** Dan directed marketing for Constellation NewEnergy and guided the corporate marketing strategy. He managed a team of 35 marketing professionals, redefining marketing approaches for C&I customers across all deregulated markets.
- **Suez Energy Resources (now ENGIE), White Plains, NY / Houston, TX (2001 - 2003):** As Marketing Director, Dan played a pivotal role in launching a top-tier energy retailer. His strategic acumen facilitated initial contracts totaling \$200 million, underscoring his ability to shape successful market entry and M&A efforts.

Education:

- BA and MBA from Michigan State University

Resume for David Chang

A seasoned digital thought leader and executive with over 15 years of experience, renowned for spearheading transformative digital disruptions that drive hyper-growth opportunities. Adept at leading digital transformations within start-ups and FTSE 100/Fortune 500 industry giants. Proven track record in crafting and deploying engaging digital experiences that onboard, engage, and retain customers, fostering brand loyalty and exploring innovative avenues. Recognized for exceptional stakeholder collaboration.

Value Proposition:

- Proficient in pinpointing high-value customer segments and employing continuous digital experimentation to enhance retention, drive new product/service adoption, and foster brand loyalty.
- Collaborative business partner skilled in cultivating immersive communities through influencer relationships across internal teams, external partners, and customers.
- Financially astute professional adept at harmonizing innovation with bottom-line results, ensuring alignment of strategies and initiatives with performance metrics.
- Bridge builder between technical and operational teams, leveraging digital expertise to create omni-channel experiences tailored to varying levels of technical proficiency.

Core Competencies/Areas of Expertise:

- Digital Acquisition: E-Commerce, Conversion Rate Optimization, Growth Hacking, P&L Guidance
- Digital Marketing: Segmentation & Targeting, A/B MVT Testing, Marketing Automation, Demand Generation
- Executive Leadership: Team Development, Project Management, Entrepreneurship, Strategic Planning, KPI Achievement

Professional Experience:

eldigital, INC / eIQhome, LLC, Houston, TX

Chief Product Officer (2022 – Present)

- Brought deep digital technology and retail energy experience to eIQhome and eIQdigital to support the development and commercialization of home energy management and residential energy shopping platforms.

Digital.Pro, LLC, Houston, TX

Independent Digital Technology Consultant (2020 – 2022)

- Successful independent Technology Consultant providing expertise for a number of firms in retail energy, home energy services and firms in other industries interested in building stronger digital presence in the marketplace.

NextEra Energy Services, Houston, TX

Director of New Digital Business (2018 – 2020)

- Pioneered PowerWizard.com, a disruptive energy shopping concierge business, assembling a top-tier team to drive technology enhancement, traffic growth, and conversion rate optimization. Orchestrated continuous experimentation resulting in substantial hyper-growth and leading the business.

Direct Energy/Centrica North America Home, Houston, TX

Head of Digital Growth & Marketing (2017 – 2018)

- Championed digital strategy and operations, doubling conversion rates and decreasing cost while elevating digital channels to the largest origination source.

NextEra Energy Services, Houston, TX

Head of Digital Transformation & Innovation (2016 – 2017)

- Revolutionized digital engagement and achieved a 17-fold ROI through the API Economy Initiative, recognized with an innovation and growth award.

Direct Energy/Centrica North America Home, Houston, TX

Head of IT Digital & Innovation (2014 – 2016)

- Oversaw digital portfolio, agile product development, and innovation, significantly stabilizing platforms and leading the digital pivot.

Constellation Energy, Baltimore, MD

Head of Digital Product (2002 – 2014)

- Led the launch of a digital business unit, achieving rapid online enrollment growth and transforming customer acquisition models.

Start-up Advisory Experience:

Advisor, Qoreboard (2018 – 2021)

- Guided Qoreboard's tech strategy, enhancing team performance management and AI/ML capabilities.

Founder, English Taiwan, Inc. (2002 – 2004)

- Established, scaled, and profitably exited a start-up through innovative strategies and SEO/SEM excellence.

Education:

- Master's Class in Artificial Intelligence: Implications for Business Strategy, Massachusetts Institute of Technology
- Bachelor's in Information Systems, Capella University

Bachelor's Study in Computer Science, University of Maryland Baltimore County