

CONSERVATION SERVICE PROVIDER (“CSP”) APPLICATION FOR REGISTRATION IN THE COMMONWEALTH OF PENNSYLVANIA

Conservation Service Providers (“CSPs”) have a specific role under Act 129, which requires a covered Electric Distribution Company’s Energy Efficiency and Conservation (EE&C) plan to include one or more CSPs to implement at least a portion of the EE&C Plan. 66 Pa.C.S. § 2806.1(b)(1)(i)(E). CSPs provide information and technical assistance to EDCs on *measures* that enable a person to increase energy efficiency or reduce energy consumption. CSPs must have no direct or indirect ownership, partnership or other affiliated interest with an EDC. 66 Pa.C.S. § 2806.1 (m). Only registered CSPs may advise an EDC and/or provide consultation, design, or administration or management services to an EDC related to the implementation of the EDC’s EE&C Plan. As such, registration of business entities as approved CSPs is required before entering into a contractual agreement with an EDC exclusively for the provision of consultation, design, administration, management or advisory services regarding that EDC’s EE&C plan. This registry is not intended as a resource for business, whose sole purpose is the installation of measures, supplying of equipment or other contracting work for use by the general public and EDC customers. If providing such services, registration as a CSP is not required for entering into an agreement with an EDC.

Any CSP subcontractor with an annual contract cost that equals or exceeds 10% of the CSP annual contract cost and is directly performing services pursuant to a contract with a CSP which has contracted with an EDC after Commission approval should also register as a CSP. This does not include third party contractors which participate in or support an EE&C Plan but are not directly contracted with a CSP which has a direct contractual relationship with the EDC subject to Act 129.

To qualify an applicant must have at least two years of experience in providing program consultation, design, administration, management or advisory services related to energy efficiency and conservation services. CSP registration is not required of entities that limit their services to the installation of energy efficiency measures or the provision of equipment or materials to EDC customers or the public in general.

1. IDENTITY OF THE APPLICANT

- a. Legal Name of Applicant: **Carmichael Lynch, Inc.**

Attach proof of compliance with appropriate Pennsylvania Department of State filing requirements.¹

¹ A copy of any document from the Pennsylvania Department of State (Pa. Dept. of State) documenting the Applicant’s Pa. Dept. of State entity number is adequate. However, the document must indicate that the Applicant’s Pa. Dept. of State registration is “active.” Certified copies of Pa. Dept. of State documents are not required.

b. Trade or Commercial or Fictitious Names Used by Applicant (d/b/a)—List all that apply.

- The Applicant will be using a fictitious name or doing business as (“d/b/a”). Identify names below. If more space is needed, list names on the back of this page or append list to completed application.
- The Applicant will not be using a fictitious name.

c. Applicant Address: **1700 Market Street, 29th floor, Philadelphia PA 19103**

d. Applicant Telephone No: **215.790.4394**

e. Applicant Email Address: **tracey.santilli@clynch.com**

f. Contact Information for Applicant. PLEASE NOTE: Upon approval of this application, this Contact Information will be listed on the Commission’s CSP Registry.

- Name **Tracey Santilli**
- Mailing Address **1700 Market Street, 29th floor, Philadelphia PA 19103**
- Telephone **215.790.4394**
- Email Address **tracey.santilli@clynch.com**

g. Predecessor(s) & Other Names used by Applicant for past five (5) years of date of this application. Provide Name(s), Address(es) and Telephone No.(s).

- Check Box if any Predecessor(s) is currently or was previously registered in Pennsylvania as a CSP. If affirmative, please provide Docket No(s). (A-[Year]-[Seven (7) Digits]) and names for all registered CSPs.

h. Parent & Subsidiary Companies & Affiliates:

- Parent Name and Contact Information.** Provide name and contact information for parent company. Check Box if any parent company is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If “None,” do not check the box and answer “None” below.

Interpublic Group

- Subsidiaries and Contact Information.** Provide name and contact information for all subsidiary companies. Check Box if any subsidiary is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If “None,” do not check the box and answer “None” below.

None

- Affiliate(s) and Contact Information.** Provide name and contact information for all affiliate companies. Check Box if any affiliate is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If “None,” do not check the box and answer “None” below.

i. Contracts & Business Partnerships:

- Check Box if Applicant intends to or has operated under contract with or has partnered with an EDC within the past five (5) years. If “None,” do not check the box and answer “None” below.
- Check Box if Applicant intends to or has operated under contract (subcontractor) with or has partnered with a CSP within the past five (5) years. If “None,” do not check the box and answer “None” below.

If any box above is checked, please provide name(s) of EDC(s) and CSP(s) and contact information for each and briefly describe the nature of business services associated with each contract and/or partnership.

None

j. Identify principal officers (owners, executives, partners and/or directors), as appropriate for Applicant’s organizational structure. Provide an organizational chart and the names, titles, business addresses and telephone numbers for each office.

Tracey Santilli, President, Philadelphia	Neil Goodspeed, Chief Media Officer
John Green, CFO	Lachlan Badenoch, Chief Strategy Officer
Julie Batliner, CGO	
Stacy Janicki, President, COO	

k. Attach to this Application a brief biography or single page professional resume for all principal officers and management directly responsible for Applicant’s operations.

l. Provide Applicant’s Employer Identification No. (EIN): 41-0852461

2. **REGISTERED AGENT**

a. If the Applicant does not maintain a principal office in the Commonwealth, the Applicant is required by the Pennsylvania Department of State to designate an approved Registered Agent as its representative in the Commonwealth. Check one of the Boxes below, as applicable:

YES, the Applicant has registered its business with the Pennsylvania Department of State. Following is the Name and Contact information for the Applicant’s Department-Approved Registered Agent.

- Registered Agent’s Name **Carmichael Lynch, Inc.**
- Registered Agent’s Mailing Address **1700 Market Street, 29th floor, Philadelphia PA 19103**
- Registered Agent’s Telephone **215.790.4394**
- Registered Agent’s Email Address **tracey.santilli@clynch.com**

NO, the Applicant has not registered its business with the Pennsylvania Department of State. STOP—To avoid denial of your application and forfeiture of your application fee, you should contact the Pennsylvania Department of State Bureau of Corporations to register as a business entity within the Commonwealth PRIOR TO completion and filing of this application with the Pennsylvania Public Utility Commission.

b. Applicant has registered its business with the Pennsylvania Department of State. Please check appropriate registration type for Applicant as designated with the Department.

- Sole proprietor (15 Pa. C.S. §4124)
- Domestic corporation (none)
- Domestic general partnership (15 Pa. C.S. §4124)
- Domestic limited liability company (15 Pa. C.S. §8913)
- Domestic limited liability partnership (15 Pa. C.S. §8201)
- Foreign corporation (15 Pa. C.S. §4124)
- Foreign general or limited partnership (15 Pa. C.S. §4124)
- Foreign limited liability company (15 Pa. C.S. §8981)
- Foreign limited liability general partnership (15 Pa. C.S. §8211)
- Foreign limited liability limited partnership (15 Pa. C.S. §8211)

c. If Applicant is not domiciled in the Commonwealth of Pennsylvania and is registered as a “foreign” entity as identified in Question 2.b., please identify all other states where applicant is registered and name the appropriate state department(s):

3. ***APPLICANT'S OPERATIONS***

Respond to each of the following four questions relating to Applicant's operations and its technical and financial fitness. Respond to each item and attach any additional information and/or statements to this Application as appropriate.

a. Describe nature of business:

Advertising and media planning and buying services.

b. Current status of business (check one):

- Applicant is presently doing business in Pennsylvania
- Applicant is presently not doing business in Pennsylvania

c. The Applicant proposes to provide the following information and technical services to an EDC. Check all services that apply and identify all EDCs with whom Applicant intends to conduct business.

- | | | |
|--|-------|-------|
| <input checked="" type="checkbox"/> Consultation | EDCs: | _____ |
| <input type="checkbox"/> Design | | _____ |
| <input type="checkbox"/> Administration | | _____ |
| <input type="checkbox"/> Management | | _____ |
| <input checked="" type="checkbox"/> Advisory | | _____ |

d. Attach to this Application a copy of any certification(s) or similar documentation that would demonstrate the technical fitness of Applicant, such as membership in trade associations, professional licenses, technical certifications, and/or names of current or past clients with a description of dates and types of services provided by Applicant.

e. **Attach to this Application proof of current liability insurance coverage.**

4. **COMPLIANCE**

Respond to each of the following Questions. Provide a statement as to the resolution or present status of any such proceedings, if applicable.

- a. In the past three years has the Applicant, the parent company, an affiliate or predecessor or partner (contractor/subcontractor business relationship) of the Applicant, or any person identified by the Applicant in this Application, been investigated or convicted of a crime involving fraud, theft, larceny, deceit, violation of consumer protection law, violation of deceptive trade law or similar activity, whether before an administrative body or in a judicial forum, in which the Applicant, an affiliate, a predecessor of either, or a person identified herein has been a defendant or a respondent?

- No
- Yes. Provide explanation:

- b. Is the Applicant, the parent company, an affiliate, or a predecessor of either, currently delinquent with any state or federal taxing authority?

- No
- Yes. Provide explanation:

- c. Identify all bankruptcy or liquidation proceedings for the prior three years. If none, state "None" below.

None

- d. Identify all customer complaints filed with a regulatory or prosecutor agency for the prior three years of the date of this application. In none, state "None" below.

None

5. ***FALSIFICATION***

The Applicant understands that the making of false statement(s) herein may be grounds for denying the Application, or if later discovered, for revoking any authority granted pursuant to the Application. This Application is subject to 18 Pa. C.S. §§4903 and 4904, relating to perjury and falsification in official matters.

Signature of Principal Official: _____

Official's Name & Title : **Tracy Santilli, President, Philadelphia**
(Please Print) _____

Date : **September 30, 2025**

None

APPENDIX A - AFFIDAVIT

[Commonwealth/State] of Pennsylvania :

: SS.

County of Philadelphia County :

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

[He/she is the President (Office of Affiant) of Carmichael Lynch (Name of Applicant);]

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

That the Applicant herein Tracey Santilli has the burden of producing information and supporting documentation demonstrating its technical and financial fitness to be registered as a conservation service provider pursuant to Act 129 of 2008.

That the Applicant herein Tracey Santilli acknowledges that it has answered the questions on the application correctly, truthfully and completely and has provided supporting documentation as required.

That the Applicant herein Tracey Santilli 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 Tracey Santilli 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.

Tracey Santilli
Signature of Affiant

Sworn and subscribed before me this 30 day of September, 20 25.



Marte Elizabeth Spain-Maas
Signature of official administering oath

My commission expires: Jan 31, 2030.

1. Identity of the Applicant

- K. Attach to this Application a brief biography or single page professional resume for all principal officers and management directly responsible for Applicant's operations.



Stacy Janicki

President and COO, Carmichael Lynch

Stacy is President of Carmichael Lynch delivering strategic leadership to clients and overseeing collaborative efforts within the agency. Her experience spans diverse business categories, including energy, utility, banking, retail, consumer packaged goods, outdoor recreation, telecommunications, and healthcare. Stacy has been named a “Woman to Watch” and IPG’s Agency Champion of Inclusion, in part for her work on Blaze, an internal group focused on supporting the growth, development, and retention of women at Carmichael Lynch.



Julie Batliner

President and CGO, Carmichael Lynch Relate

As Chief Growth Officer of Carmichael Lynch and resident of Carmichael Lynch Relate PR, Julie helps clients grow with the agency. She is a catalyst for integration of all agency offerings, bringing clients a holistic, cross-discipline approach to their marketing challenges. This unique ability to activate multiple and distinct agency resources based on individual client needs has accelerated growth for clients and the agency alike. She has been individually recognized with two Stevie Awards in the categories of Female Executive of the Year and Woman of the Year, named a PRWeek Power List Most Influential Communicator and a Working Mother of the Year by She Runs It (formerly AWNY).



Tracey Santilli — your main contact

President, Carmichael Lynch — Philadelphia Office

As president of the Philadelphia office, Tracey is responsible for agency operations, culture, and client relationships. She leads innovative marketing strategies that drive brand growth and consumer engagement. She has worked across a range of categories including energy efficiency, utilities, retail, healthcare, financial services, food and beverage, and tech. Tracey has been named a “Woman of Distinction” by the Philadelphia Business Journal. She is also the incoming board chair of the Please Touch Museum, a national children’s museum.



Lachlan Badenoch

Chief Strategy Officer

Lachlan leads our planning team, unearthing both deep insights and a bit of brand poetry. With more than 20 years of strategic leadership at agencies in Europe and the U.S., Lachlan's cross-discipline global experience has driven business thinking and marketing innovations for clients such as Xcel Energy, PECO, BMW, Virgin, Orange, McDonald's, Nintendo, Kellogg's, Heinz, Carlsberg, Nestlé, General Mills, and many others.



Neil Goodspeed

Chief Media Officer

Neil has led his team to myriad winning strategies for clients looking to max out creativity, innovative thinking, and progressive approaches to efficient media partnerships and activations. Neil's team deploys advanced targeting and data-driven strategies across all of our clients, including a hands-on keyboard approach through our internal trade desk and best-in-class brand safety and quality guidelines. With accomplishments like helping Xcel Energy reach more customers than ever before, getting Jack Link's Sasquatch in the ESPN Body Issue, selling egg rolls on Twitch, getting dogs adopted for Subaru, or breaking TikTok records in the first hour of a campaign launch, it's no wonder he's racked up industry-wide awards.



John Green

Chief Financial Officer

As chief financial officer, John leads the agency's strategic financial discipline and keeps a steady hand on balancing continued growth with intelligent investment. In addition to overseeing financial functions, including accounting, strategic planning, auditing, and corporate reporting, he also manages IT and facility/office services. Prior to joining the agency, John spent time in public accounting and financial management at two large public companies.

3. Industry Associations

D. Attach to this Application a copy of any certification(s) or similar documentation that would demonstrate the technical fitness of Applicant, such as membership in trade associations, professional licenses, technical certifications, and/or names of current or past clients with a description of dates and types of services provided by Applicant.

Our agency and employees are actively involved in a number of industry- and community-related organizations and associations, including:

- American Advertising Federation
- American Association of Advertising Agencies (plus board and council members)
- Arthur W. Page Society
- Association of National Advertisers (plus committee members)
- American Marketing Association
- PR Council (plus board members and committee members)
- The One Club
- Public Relations Society of America (several staff are certified APR)





CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

9/30/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).


PRODUCER EPIC Insurance Brokers & Consultants 1140 Avenue of the Americas – 8 th Floor New York, NY 10036	Phone No.: (212) 488-0200 Fax No.: (212) 488-0220	CONTACT Rudy Milfort NAME: PHONE 212.295.5425 (A/C, No, Ext): FAX E-MAIL nellie.verdejo@epicbrokers.com ; rudy.milfort@epicbrokers.com ADDRESS:															
	<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: AMERICAN CASUALTY COMPANY OF READING PENNSYLVANIA</td> <td>20427</td> </tr> <tr> <td>INSURER B: THE CONTINENTAL INSURANCE COMPANY</td> <td>35289</td> </tr> <tr> <td>INSURER C: TRANSPORTATION INSURANCE COMPANY</td> <td>20494</td> </tr> <tr> <td>INSURER D: CONTINENTAL CASUALTY COMPANY</td> <td>20443</td> </tr> <tr> <td>INSURER E: GREAT AMERICAN ASSURANCE COMPANY</td> <td>26344</td> </tr> <tr> <td>INSURER F: EVEREST NATIONAL INSURANCE COMPANY</td> <td>10120</td> </tr> <tr> <td>INSURER G: ASPEN AMERICAN INSURANCE COMPANY</td> <td>43460</td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: AMERICAN CASUALTY COMPANY OF READING PENNSYLVANIA	20427	INSURER B: THE CONTINENTAL INSURANCE COMPANY	35289	INSURER C: TRANSPORTATION INSURANCE COMPANY	20494	INSURER D: CONTINENTAL CASUALTY COMPANY	20443	INSURER E: GREAT AMERICAN ASSURANCE COMPANY	26344	INSURER F: EVEREST NATIONAL INSURANCE COMPANY	10120	INSURER G: ASPEN AMERICAN INSURANCE COMPANY
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COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
D	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:	Y		7011768678	1/1/2025	1/1/2026	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$15,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$1,000,000 \$
D	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS	Y		7011877612	1/1/2025	1/1/2026	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB DED RETENTION\$			7012090190 EXC 5856709	1/1/2025 1/1/2025	1/1/2026 1/1/2026	EACH OCCURRENCE \$10,000,000 AGGREGATE \$10,000,000 1ST EXCESS LIABILITY (E) \$7.5 po 15 x 10
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	N/A	WC 7011768681-AOS WC 7011768695-CA WC 7011768700-AZ, OR & WI	1/1/2025 1/1/2025 1/1/2025	1/1/2026 1/1/2026 1/1/2026	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
F	2 ND EXCESS LIABILITY LAYER 3 RD EXCESS LIABILITY LAYER			XC5EX02137251 CX0139E25	1/1/2025 1/1/2025	1/1/2026 1/1/2026	LIMIT: 7.5 po 15 x 10 LIMIT: 10M po 20M x 25M

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 PPL Electric Utilities Corporation is included as an Additional Insured where required by written contract with respects to liability arising out of the Named insured operations as per terms and conditions of the policies.

CERTIFICATE HOLDER PPL Electric Utilities Corporation Two North Ninth Street Allentown, PA 18101	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 1-13 
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