

May 26, 2026

Pennsylvania Public Utility Commission  
Secretary's Bureau  
400 North Street, Keystone Building  
Harrisburg, PA 17120

Secretary Matthew Homsher:

EnergySage, Inc. hereby submits revisions to its application to become an electricity broker in the State of Pennsylvania (A-2026-3062391). Included in this revised application are Attachments D and E. No confidential information is included in this revision. If there are any questions, please contact me at [legal@energysage.com](mailto:legal@energysage.com).

Thank you for your consideration.

Naman Trivedi, President, EnergySage  
1660 Scenic Ave  
Costa Mesa, CA 92626  
[naman.trivedi@se.com](mailto:naman.trivedi@se.com)

## BEFORE THE PENNSYLVANIA PUBLIC UTILITY COMMISSION

Application of EnergySage, Inc., d/b/a \_\_\_\_\_, for approval to offer, render, furnish, or supply electricity or electric generation 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 fictitious name or d/b/a*), primary address, web address, and telephone number of Applicant:

EnergySage, Inc.  
201 Washington St. Suite 2700  
Boston, MA 02108  
[www.energysage.com](http://www.energysage.com)

- 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.

Corporation Service Company  
5235 North Front Street,  
Harrisburg, PA, 17110

- 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.

Janet Florez  
Chief Financial Officer  
3 Center Plaza, suite 400, Boston, MA 02108  
508-205-9130  
[legal@energysage.com](mailto:legal@energysage.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.

Ben Williams  
70 Mechanic St, Foxboro, MA 02035  
617-275-7061  
[ben.williams@se.com](mailto:ben.williams@se.com)

- 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.

Janet Florez  
Chief Financial Officer  
3 Center Plaza, Suite 400, Boston, MA 02108  
888-838-4638  
[retailchoice@energysage.com](mailto:retailchoice@energysage.com)

Naman Trivedi  
President, EnergySage  
1660 Scenic Ave, Costa Mesa, CA 92626  
408-582-3432  
[legal@energysage.com](mailto:legal@energysage.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**

**X** 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.  
**See Attachment A.**
- Give name and address of officers.

Naman Trivedi  
 President, EnergySage  
 1660 Scenic Ave, Costa Mesa, CA 92626  
 408-582-3432  
[legal@energysage.com](mailto:legal@energysage.com)

Tyler Moragne  
 Director, EnergySage  
 9101 Burnet Rd, Austin, TX 78758  
 (650) 906-8232  
[tyler.moragne@se.com](mailto:tyler.moragne@se.com)

### 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.

EnergySage has no 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.

EnergySage has no 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.

EnergySage does not have any related Docket Numbers.

### 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.

EnergySage is an online comparison marketplace for energy products such as solar, retail electricity plans, energy storage, and heat pumps.

EnergySage is creating a web-based marketplace for residential electricity customers and our service is free for end users. EnergySage is paid a referral fee by the Retail Electricity Providers, ranging from zero to \$125 per customer, sometimes with a separate residual fee, paid monthly as long as the customers remain with the referred Retail Electricity Provider. EnergySage plans to serve as an electricity broker to offer these services.

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"/> PECO          |
| <input type="checkbox"/> Duquesne Light              | <input type="checkbox"/> Pike          |
| <input type="checkbox"/> FirstEnergy PA - Met-Ed     | <input type="checkbox"/> PPL           |
| <input type="checkbox"/> FirstEnergy PA - Penelec    | <input type="checkbox"/> UGI Utilities |
| <input type="checkbox"/> FirstEnergy PA - Penn Power | <input type="checkbox"/> Wellsboro     |
| <input type="checkbox"/> FirstEnergy PA - West Penn  |  |
- 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.

EnergySage intends to begin operations in Pennsylvania in Q1 2026, pending approval of this 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.

EnergySage nor its affiliates and predecessors, or key personnel, have been involved with criminal or civil proceedings.

- 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.

EnergySage has not been involved in any regulatory disciplinary action in the State or other jurisdiction.

Naman Trivedi, President of EnergySage is also affiliated with WattB, Inc. DBA WattBuy. WattBuy has had two instances in which its license was revoked in the past five years.

(1) WattB, Inc DBA WattBuy's Illinois broker license was revoked in April 2022 due to noncompliance with Company's Secretary of State filings. The license was re-awarded its license in March 2024 and has remained in compliance since.

(2) WattB, Inc DBA WattBuy's New York energy consultant license was revoked in October 2025 due to failing to file its annual fee. WattB, Inc DBA WattBuy is still considering whether it intends to participate in this market. If the company intends to participate in this market, it will seek to re-apply in New York.

WattB, Inc has successfully managed a majority of its licenses for a number of years. The Company engages with regulatory consulting firms to assist in maintaining its licenses and is dedicated to maintaining its licenses once approved.

- 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.

See 5b.

## 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

**See Attachment F**

- 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><b>Citizens' Electric Company:</b>                      Citizens' Electric Company                      Attn: EGS Coordination                      1775 Industrial Boulevard                      Lewisburg, PA 17837</p>	<p><b>Duquesne Light Company:</b>                      Duquesne Light Company                      Regulatory Affairs                      411 Seventh Street, MD 16-4                      Pittsburgh, PA 15219</p>
<p><b>FirstEnergy Pennsylvania Electric Company:</b>                      FirstEnergy Pennsylvania Electric Company                      Legal Department                      341 White Pond Drive                      Akron, OH 44320</p>	<p><b>PECO:</b>                      PECO Energy Company                      Manager Energy Acquisition                      2301 Market Street                      Philadelphia, PA 19101-8699</p>
<p><b>Pike County Light &amp; Power Company:</b>                      Corning Natural Gas Holding Corporation                      Vice President – Energy Supply                      330 West William Street                      Corning, NY 14830</p>	<p><b>PPL:</b>                      PPL                      Office of General Counsel                      Attn: Kimberly A. Klock                      Two North Ninth Street (GENTW3)                      Allentown, PA 18101-1179</p>

**UGI:**

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

**Wellsboro Electric Company:**

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

## 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.
- X** **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.

**See Attachment B**

### **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](mailto: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.

**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.

**See Attachment 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.

N/A

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

EnergySage, as a broker, earns commissions from retail electricity providers when we provide the retail electricity provider with a qualified customer through our marketplace. The retail electricity provider within 45 days will pay EnergySage the requisite commission as outline in the contract with the retail electricity provider.

**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.

Janet Florez  
Chief Financial Officer  
3 Center Plaza, Suite 400, Boston, MA 02108  
508-205-9130  
receivables@energysage.com

f. **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.*

**See Attachment C**

## 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:

- 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.

**See Attachment D.**

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.

EnergySage markets energy products in two main ways:

1. Partnership with enterprises in the real estate, energy, and personal finance space. These partnerships present EnergySage to their customers as a platform to access energy products and services.
2. EnergySage uses a combination of search engine marketing and search engine optimization to reach additional customers interest in our energy products.

EnergySage follows the oversight of our partnership agreements. Further, digital platforms have an explicit set of terms and service, and program requirements that EnergySage must follow in order to continue using their platforms. Within these terms, EnergySage must agree to not misrepresent the company in ads, as well as agree to stringent restrictions on data collection, abuse, dangerous products or service, or dishonest behavior.

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.

**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.***

N/A

## 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](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.

X      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.

X      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.

**See Attachment G**

## 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 FirstEnergy PA - 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			
FirstEnergy PA - Met Ed		X	X		X		
FirstEnergy PA - Penelec	X	X			X	X	X
FirstEnergy PA - Penn Power	X			X			
FirstEnergy PA -West Penn		X		X		X	X
PECO			X				
Pike					X		
PPL		X	X		X	X	
UGI					X		
Wellsboro						X	
Entire Commonwealth	X	X	X	X	X	X	X

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

### 13. SIGNATURE

Applicant: \_\_\_\_\_

By: \_\_\_\_\_

Title: \_\_\_\_\_

## 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:** EnergySage, Inc.

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

Applicant's Use

PUC Secretary's Bureau Use

# **Attachment D - Revised**

**Key Personnel Experience:**

Naman Trivedi has over a decade of experience leading teams in the energy industry, most recently as Co-Founder and CEO of WattB, Inc., a registered retail energy broker and choice marketplace. Naman facilitated partnerships, technology development, and consumer services in his capacity leading the team. Naman now serves as Vice President, Home at Schneider Electric and President of EnergySage, Inc. Naman's prior experience includes Google and the White House Office of Science and Technology Policy.

Tyler Moragne currently serves as Head of Prosumer Software Companies at Schneider Electric, responsible for a significant portfolio of companies in Schneider Electric's North America region, including EnergySage, Inc where he serves as the Director. Tyler has been one of the leading voices in energy for many years, serving as Head of Residential Energy at Tesla, Chief Strategy Officer at Bidgely, and VP of Prosumer Hardware at Schneider. At Tesla, Tyler led a team of more than 3,000 employees and helped to grow Tesla into one of the most innovative players in the energy space, including through the launch of Tesla Electric in Texas.

**Jurisdiction**

EnergySage currently holds a broker license in Texas. Currently, EnergySage is seeking broker licenses in Delaware, Washington DC, Illinois, Massachusetts, Maine, Maryland, New Hampshire, New Jersey, New York, Ohio, and Pennsylvania. As of the data of this application, EnergySage has not received its licenses in the any of these jurisdictions.

**Experience Description**

EnergySage is an online comparison marketplace for energy products such as solar, retail electricity plans, energy storage, and heat pumps. EnergySage is an online comparison marketplace for energy products such as solar, retail electricity plans, energy storage, and heat pumps.

EnergySage has been providing comparison marketplace services since 2009, beginning with solar and expanding to other products and services over the last 15 years. EnergySage's services consistently return 70+ NPS scores and the company currently has a 4.8/5.0 rating on reviews.io.

Several members of the EnergySage team have prior experience at top energy brokers and the team boasts more than 50+ cumulative years of experience in the consumer retail choice industry.

# **Attachment E - Revised**

# Naman Trivedi

naman@wattb.com | (408) 582-3432 | Seattle, WA

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## WORK EXPERIENCE

### Schneider Electric

*VP, Home - Schneider Electric | President, EnergySage*

August 2025 - Present

- Responsible for Schneider Electric's residential software businesses, including WattBuy, EnergySage, and Qmerit, driving strategy and growth across the home energy platform portfolio.
- Leading integration and scaling of acquired software platforms to deliver a unified home electrification experience for homeowners, contractors, and energy providers.
- Overseeing product vision, go-to-market strategy, and P&L management across multiple business units serving the residential clean energy transition.

### WattBuy, Inc.

*Co-Founder & CEO*

July 2017 - August 2025

- Pioneered home electrification by developing a comprehensive platform that guides homeowners through EV charging, rooftop solar, solar + storage, heat pumps, and more, making the transition to clean energy seamless and cost-effective.
- Partnered with leading solar companies, retail energy providers, utilities, and battery installers nationwide, offering scalable SaaS and API solutions that drive growth and optimize customer engagement.
- Secured over \$15 million in capital from prominent investors such as Techstars, Evergy Ventures, Schneider Electric Ventures, and My Climate Journey, underscoring WattBuy's market impact and long-term potential.
- Served hundreds of thousands of customers each month, delivering data-driven insights and personalized recommendations that help them reduce costs and carbon footprints.
- Forged strategic partnerships across the energy ecosystem, working directly with retailers, utilities, and technology providers to streamline adoption of next-generation energy solutions.

### Google

*Associate Account Strategist*

July 2016 - August 2017

- Accelerated growth for energy-focused SMBs by leveraging Google's advertising platform to help small and medium-sized energy companies scale their marketing efforts and drive sustainable revenue growth.
- Exceeded 128% of revenue goals for mid-market advertisers and advocated for feature requests in AdWords that benefited energy-sector clients.

### Box, Inc.

*Product Manager Intern*

May 2015 - August 2015

- Created Box's new Enterprise Advisory Team, a scaled effort to increase retention of Box's largest enterprise customers.
- Efforts led to the hiring of a full-time program manager, who is now managing 300+ customers and over \$9 million in revenue.

### The White House Office of Science and Technology Policy

*Intern*

August 2013 - May 2015

- Supported the Department of Energy's SunShot Initiative, working alongside cross-agency partners to drive cost reductions in solar energy and accelerate the adoption of renewables at a national scale.
- Drafted a Congressional report on federal prize programs (challenge.gov) that spurred innovation within NASA, the Department of Energy, DARPA, and the Department of Defense.

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## EDUCATION

### Georgetown University

*B.S.F.S. International Economics*

Washington DC

May 2016

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## **SKILLS**

Leadership • Fundraising • Product Management • Product Vision

# TYLER MORAGNE

## SUMMARY

Driven executive leader with track record of leading successful end-to-end business transformations and in high pressure environment. Experience guiding global teams of over 3,000 members, covering technical and non-technical functions. Action-oriented and collaborative approach with passion for developing and executing strategic plans to scale new technologies in the energy and electrification industry.

## SKILLS

- Business Operations
- Strategic Planning
- Operations Management
- Organizational Design
- Commercialization
- Marketing Strategy
- Digital Strategy
- Product Management
- Change Management
- Process Optimization
- Financial Planning
- Business Intelligence

## WORK HISTORY

### SCHNEIDER ELECTRIC 10/2024 to CURRENT

#### SVP, PROSUMER SOFTWARE - SCHNEIDER ELECTRIC | DIRECTOR, ENERGYSAGE 10/2025 to CURRENT

- Responsible for Qmerit (qmerit.com), EVConnect (evconnect.com), Energysage (energysage.com), WattBuy (wattbuy.com)
- ~700 total employees across technical and non-technical teams. Full P&L ownership / end-to-end responsibility.

#### VP, HARDWARE, INNOVATION GROUP 10/2024 to 10/2025

- Led a ~300 person hardware division developing a portfolio of residential electrification and commercial EV charging products. Full P&L ownership / end-to-end responsibility.

### BIDGELY 04/2015 to 08/2023

#### CHIEF STRATEGY OFFICER 04/2024 to 10/2024

- CSO of software company delivering AI-powered software solutions to energy utilities internationally

### TESLA 04/2015 to 08/2023

#### DIRECTOR & HEAD OF RESIDENTIAL ENERGY 08/2022 to 08/2023

- Head of Tesla's Residential Energy business, reporting directly to Tesla CEO
- Ownership & accountability of performance and P&L for business, achieving ~\$1.5B in annual revenue
- Managed ~3k employees across 10 countries, leading business, operations, engineering and product functions
- Achieved records in deployment volume, productivity, customer experience, and quality despite significant macro-economic and supply chain headwinds. Key decision maker on product, price, sales, and marketing.

#### SR. MANAGER & HEAD OF ENERGY BUSINESS OPERATIONS 06/2021 to 08/2022

- Managed ~1.5k employees and led all Residential Business Operations functions, covering Customer Operations, Business Planning, Process Engineering, NPI, Quality, Logistics, and Business Development
- Achieved 40% YoY volume growth, including records in sales for new solar and battery products

#### MANAGER, BUSINESS PLANNING & ANALYTICS 05/2020 to 06/2021

- Created operating plan and managed team of analysts for business achieving over \$1B in annual revenue
- Helped business navigate COVID-related supply and labor challenges to achieve 20% YoY volume growth

#### BUSINESS OPERATIONS & FINANCE 02/2017 to 05/2020

- Owner of operational plan (demand, supply, sales, labor) for energy group covering solar and battery products

#### ANALYTICS & PLANNING 04/2015 to 02/2017

- Lead analyst focused on market planning and sales optimization for residential solar business

## BOARD & ADVISORY

ADVISOR & BOARD MEMBER, Zero Homes 03/2024 to CURRENT

ADVISOR, Base Power Company 03/2024 to 03/2026

ADVISOR, Alsym Energy 03/2024 to CURRENT

## **EDUCATION**

**Dartmouth College**, Hanover, New Hampshire  
**Bachelor of Arts**, Environmental Science, 06/2014

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## **PROUD FATHER, AVID READER, OUTDOORS ENTHUSIAST**

Devoted father to two daughters. Ardent reader of non-fiction, especially history & science literature. Passionate about enjoying and preserving the natural world with a focus on hiking, climbing, and sustainable agriculture.