

Custom Incentives program pre-approval application

Thank you for participating in AES Indiana's Business Rebates & Incentives program. Refer to the information below to ensure you are eligible for program rebates and your application is complete. Please retain a copy of your completed application for your records. To access all AES Indiana applications, please visit aesindiana.com/businesssavings.

What You Will Need:

1. Your AES Indiana account number, AES Indiana Service ID and Rate Code
2. Electric savings calculations
3. Project proposal / scope of work / proposed equipment specification sheets
4. Installing contractor information (if available)
5. Payee's IRS form W-9

Need Help?

For assistance completing this form, call **888-982-7071** to speak with a program representative.

How to Apply for a Rebate

Step 1: Determine Eligibility

Applicant

The applicant must be an active AES Indiana business customer with a qualifying Rate Code at the time of equipment installation.

Applicant and Installation

The application must be completed in full and signed prior to submittal.

Equipment and Installation

In order to qualify for an incentive you may not purchase or install equipment until receiving pre-approval from AES Indiana in the form of a Letter of Intent.

Step 2: Complete Application & Attach Supplemental Documentation

Complete Application

Unless noted otherwise, all fields must be completed on the application.

Sign Application

The application must be signed in the space provided on page 4.

Attach Supplemental Documentation

Ensure you have attached a copy of all documentation to the rebate form.

Documentation should include:

- A detailed scope of work
- Itemized costs for the proposed scope of work
- Savings calculations
- Facility description and equipment run hours

Program applications and required documents may be submitted using one of the three methods below.

Online Rebate Portal

Skip the paper application. Submit and track your rebate online at aesindiana.com/businessrebates.

U.S. Mail

AES Indiana Business Rebates & Incentives Program
16350 Felton Rd.
Lansing, MI 48906

Email

custom@aesindianarebates.com

Step 3: Submit Paperwork

Double-Check Information

Make sure information listed on the application is correct and that you have provided as much supplemental documentation as possible.

Submit Application

Submit pages 3 and 4 of your completed application and supplemental documentation through one of the methods posted above.

Note: If you choose to email your application, be sure to include all documents as email attachments.

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Terms and Conditions

General Eligibility

This offer provides financial incentives for the purchase of new, installed qualifying equipment and is not dependent on the purchase of any other equipment unless indicated. Offer valid only for AES Indiana customers served under non-residential rate SS, SE, SH, SL, PL, PH or HL. Equipment must have AES Indiana electric service. Incentive funds are limited and available on a first-come, first-served basis.

Verification

AES Indiana reserves the right to verify sales receipts and/or installations of equipment and that the equipment installed meets program requirements before granting incentives. A random inspection may be conducted to verify installations.

Program Modifications

AES Indiana reserves the right to alter or discontinue this incentive offer at any time without notice. Financial incentives are limited and are available on a first-come, first-served basis.

Rebate Calculations

Incentive amount is calculated based on first-year energy savings. The incentives are earned at \$0.07–\$0.10 per kWh saved, depending on project type. Incentives are limited to a maximum cap of \$1,000,000 per project at a service ID and/or building behind a master meter. Projects may be broken down by technology type, but will require a separate application for each technology. Total combined Custom and Prescriptive Incentives are capped at \$1,000,000 per customer per calendar year. In no case will the program pay more than 50% of the total material and external labor cost.

Disclaimer

Customer and/or vendor hereby agrees to indemnify, hold harmless, and release AES Indiana and its affiliates from any and all actions or claims in regards to the installation, operation and disposal of equipment (and related materials) covered herein including liability from incidental or consequential damages. AES Indiana does not endorse any particular manufacturer, product or system design within these programs; does not expressly or implicitly warrant the performance of installed equipment (contact your contractor for details regarding equipment warranties) and is not liable for any damage caused by the installation of the equipment or for any damage caused by the malfunction of the installed equipment. AES Indiana does not guarantee that energy efficiency equipment purchased and installed or services provided through this program will result in energy and cost savings. AES Indiana reserves the right to deny or limit any incentive request. Please allow 6–8 weeks to receive your incentive.

Eligibility Dates

This incentive form is only eligible for qualified purchases and installations performed on or after January 1, 2023.

- Before starting an energy efficiency project, the AES Indiana customer must complete and submit this application as directed on page 1 for approval. The AES Indiana Business Rebates & Incentives program incentive cannot be granted without prior completion of this application, and subsequent approval by AES Indiana. Energy service companies or contractors may assist in preparing the application, but an authorized representative of the AES Indiana customer must sign this application to be eligible to participate in the AES Indiana Business Rebates & Incentives program. Completion of this application does not guarantee the approval of a Custom Incentive.
- Do not begin your energy efficiency project(s) or purchase equipment until you receive written approval in the form of a Letter of Intent from AES Indiana.
- Eligibility for Custom Incentives on LED lighting is limited to products that appear on one of the following qualified product lists (QPLs):
 - ENERGY STAR® qualified LED light bulbs
 - ENERGY STAR qualified commercial LED lighting
 - DesignLights™ Consortium QPL
 - If your products are not included on the ENERGY STAR or DesignLights Consortium QPLs, please contact the program manager at 317-829-2760.

Product use must be in alignment with category that product is listed under.

- Once all documentation is received by AES Indiana (a site inspection may be completed if necessary), AES Indiana will complete an engineering review and indicate the anticipated Custom Incentive amount in a Letter of Intent based on the projected energy savings. Upon completion of the project and verification of installation and operation of the energy-saving measures, AES Indiana will issue a Custom Incentive check in the amount indicated in the Letter of Intent, or adjust if the project varies from the information originally submitted.
- Measures must meet minimum cost-effective requirements as determined by AES Indiana. Installed energy efficiency measures must have at least a five-year measure life and a one-year minimum payback period prior to incentives.



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Terms and Conditions, continued

Taxes

Incentives are taxable and if greater than \$600 will be reported to the IRS unless you are exempt. The third-party administrator will report the rebate as income to you on IRS Form 1099 unless you have checked corporation or exempt status on page 1. You are urged to consult your tax advisor concerning the taxability of incentives. AES Indiana is not responsible for any taxes that may be imposed on your business as a result of your receipt of this incentive.

Environmental Attributes

Customer agrees to transfer to AES Indiana all "Environmental Attributes" attributable to the Energy Efficiency Projects or its operation. Environmental Attributes include any and all credits, benefits, emissions reductions, offsets and allowances, howsoever entitled, resulting from the avoidance of the emission of any substance into the air, soil or water at or by AES Indiana generating facilities through reduced generation of energy or other savings or offsets on account of the Energy Efficiency Project(s). Customer will not claim ownership of any Environmental Attributes. As long as Customer at the same time states the Energy Efficiency Project(s) was made possible with funding from AES Indiana, Customer may claim that it is facilitating the production of the Environmental Attributes attributable to the Energy Efficiency Project(s).

Custom Incentives program pre-approval application

Customer Information			
AES Indiana Account Holder Name:		Contact Name:	
AES Indiana Account Number (as shown on utility bill):	Business Rate Class:	AES Indiana Customer Service ID Number (where equipment is installed) (REQUIRED):	
Phone:		Email:	
Installation Street Address:		City:	State: ZIP Code:
Building Type – Required (check one)			
<input type="checkbox"/> Auto Repair	<input type="checkbox"/> Hotel/Motel	<input type="checkbox"/> Office (Med/Large)	<input type="checkbox"/> Retail
<input type="checkbox"/> College/University	<input type="checkbox"/> Industrial (Light)	<input type="checkbox"/> Office (Small)	<input type="checkbox"/> School (High/Middle)
<input type="checkbox"/> Food Sales/Grocery	<input type="checkbox"/> Industrial 1 Shift	<input type="checkbox"/> Public Assembly	<input type="checkbox"/> School (Elementary)
<input type="checkbox"/> Fast Food Restaurant	<input type="checkbox"/> Industrial 2 Shift	<input type="checkbox"/> Public Order/Safety	<input type="checkbox"/> Warehouse
<input type="checkbox"/> Full-Service Restaurant	<input type="checkbox"/> Industrial 3 Shift	<input type="checkbox"/> Religious/Worship	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Healthcare			
Mailing Address for Incentive Check			
Payee Legal Name (as shown on IRS form W-9):		Payee Business Name (if different than payee legal name):	
Payee Contact Name:		Email:	Phone:
Payee Legal Address:		City:	State: ZIP Code:
Payee Federal Tax Classification (check ONE only):			
<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor/Individual <input type="checkbox"/> LLC <input type="checkbox"/> Other <input type="checkbox"/> Exempt			
Payee Taxpayer Identification Number (TIN) (Complete ONE only. Must match payee legal name above.)			
FEIN #: _____ or SSN: _____			
Installing Contractor Information			
Business Name:		Contact Name:	
Phone:		Email:	
Street Address:		City:	State: ZIP Code:

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Project Status

- ☐ Check to confirm that you have not signed a purchase order/contract, ordered equipment, or started construction associated with this proposed project. A Letter of Intent must be issued prior to undertaking any of these project-related financial commitments.

Sign Application

I hereby certify that: 1. The information contained in this application is accurate and complete. 2. All rules of this incentive application have been followed. 3. I have read and understood the Terms and Conditions of this document. I agree to verification of equipment installation, which may include a site inspection by a program or utility representative. I understand that I am not allowed to receive more than one incentive from this program on any piece of equipment. I hereby agree to indemnify, hold harmless, and release the utility from any actions or claims in regard to the installation, operation, or disposal of equipment (and related materials) covered herein, including liability from any incidental or consequential damages.

Customer Signature:

Print Name:

Date:

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Project Summary

Provide a brief summary of the proposed equipment, project scope, and energy savings calculations, if available. Additional information may be attached or included on the reverse of page.

Estimated Project Completion Date (REQUIRED)

Is the existing equipment operational? ☐ Y ☐ N

If yes, what is the remaining useful life expectancy? _____ years

Baseline Equipment

Describe the existing equipment or systems that the proposed project will impact.

Facility Description

Describe the facility, such as typical uses, products manufactured, business hours, main uses of electric energy, etc.

Electric Savings Calculations

Energy Efficiency Measure Description	kWh	Dollars
Estimated baseline energy usage for the equipment to be replaced		\$
Estimated annual energy usage for the facility		\$
Project Benefits	Without Rebate	With Rebate
Estimated project cost	\$	\$
Estimated payback (yrs.)	years	years