



HEAT Loan Intake Form



Section 1 (Existing conditions to be completed by Energy Specialist):

Date of Energy Assessment: _____

Energy Assessment Company _____

Energy Specialist: _____

Site ID: _____

Units in Building: 1 2 3 4 _____

Condo yes no Complex Name _____

Resident Name: _____

Columbia Gas Account # _____

Address: _____ Town: _____

CHICOPEE, LAKEVILLE, MANSFIELD, RAYNHAM, SOUTH HADLEY, or TAUNTON, MA ONLY

Existing Thermal Shell Conditions:

Existing Heating System:

- Insulation and/or Air Sealing Measures are recommended
- No Insulation or Air Sealing Upgrades are recommended
 - Already Efficient
 - Site Specific Conditions that prevent completing upgrades (indicate condition below)
 - Knob and Tube Wiring Moisture Concerns
 - Structural Concerns Other _____
 - Combustion Safety Concerns

- Type: Furnace Steam Boiler
 Hot Water Boiler Other _____
- Fuel: Natural Gas Oil
 Propane Electric Other _____

Existing Domestic Hot Water Heater:

- Type: Freestanding Tank Indirect Tank
 Tankless Other _____
- Fuel: Natural Gas Oil
 Propane Electric Other _____

Section 2 (To be completed by the loan applicant/owner):

Owner Occupied YES NO

of Occupants in Household: _____

Loan Applicant Name(s): _____

(as it will appear on your lender application)

Landlord/Owner Address (if different): _____

Installation Address: _____

City: _____ State: _____ Zip Code: _____

City: _____ State: _____ Zip Code: _____

Home Phone: (_____) _____ - _____

Home Phone: (_____) _____ - _____

Cell Phone: (_____) _____ - _____

Cell Phone: (_____) _____ - _____

Email: _____
(to be used in communication with you only)

I am interested in applying for the HEAT Loan for the following Energy Efficiency Improvements:

- Insulation Energy Efficient Heating Equipment Domestic Hot Water Equipment

Loan Applicant/Owner Acknowledgement:

I certify that I have read and understand the Minimum Standards and Requirements information that was provided and have provided a copy to the individual contractor(s) whose proposal(s) are submitted with this HEAT Loan Intake Form for eligibility approval.

If desired, customer can contact a Participating Lender for pre-approval before obtaining firm contractor estimates. I understand that I cannot apply for a HEAT Loan until I submit proposals to the HEAT Loan Administrative Vendor, RISE Engineering, and receive a HEAT Loan Authorization Form.

Furthermore, I understand that after receiving the HEAT Loan Authorization Form, I must formally apply for the HEAT Loan at a Participating Lender. A listing of Participating Lenders, including a summary of applicable fees and charges, can be obtained at MassSave.com/HEATLoan.

The actual amount of the HEAT Loan will be determined by the actual costs of all of the approved energy efficiency improvements. The HEAT Loan amount shall be minus any additional rebates available through the Mass Save program administrator(s).

I understand that receipt of a HEAT Loan Authorization Form does not guarantee approval for a HEAT Loan. HEAT Loans may only be provided directly from a Participating Lender. I understand that I should not complete any energy efficiency improvements or otherwise rely on the funds of the HEAT Loan until I receive a formal commitment from a Participating Lender.

I have read, understood, and agree to the Terms and Conditions printed on the reverse side of this form and have read the minimum standard sheets for the efficiency improvements I am interested in having financed.

Loan Applicant Signature(s) _____ Date: _____

Loan Applicant Signature(s) _____ Date: _____



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To apply for the HEAT Loan, submit the following:

- This completed HEAT Loan Intake Form
- Contractor proposal(s) for the eligible improvements you want to finance with the HEAT Loan including required documentation. See Steps and Minimum Standards forms for more information.

Upon receipt of your application forms, RISE Engineering will review the submitted proposal(s) and verify compliance. If the submitted proposal(s) meet the Minimum Standards and Requirements, RISE Engineering will provide the customer with a HEAT Loan Authorization Form indicating the amount of the HEAT Loan that the customer can apply for a 0% HEAT loan from a participating lender.

Loan Options for 1-4 Unit Homes			
Eligible Customer 1-4 Unit property	Type	Loan Amount	Loan Term
Owner Occupied	Micro Loan	\$500 - \$2,000	24 months
Owner Occupied	Standard Loan	\$2,001 - \$15,000	Up to 84 months
Owner Occupied	Expanded Loan	\$15,001 - \$25,000	Up to 84 months
Non-Owned Occupied	Rental Property Loan	\$5,000 - \$25,000	Up to 84 months

Loan type, as well as minimum and maximum loan amounts offered can vary by participating lender.

Note: All residentially metered single units in condo complexes are eligible to apply for a HEAT loan for eligible measures. All other units are NOT eligible for the HEAT Loan Financing Program.

Terms and Conditions:

Customer Eligibility: You must be a current Columbia Gas of Massachusetts residential customer in **CHICOPEE, LAKEVILLE, MANSFIELD, RAYNHAM, SOUTH HADLEY, or TAUNTON** eligible to participate in the Mass Save Program. The applicant must be the owner of the one to four family home or a residentially metered, single condo unit, which must be the residence receiving the energy efficiency improvements. Customer may only receive one HEAT Loan.

Incentives: The HEAT Loan amount shall be minus any additional rebates or incentives available through the Mass Save program administrator(s).

No Warrantees: COLUMBIA GAS OF MASSACHUSETTS DOES NOT WARRANTY THE PERFORMANCE OF ANY INSTALLED EQUIPMENT. COLUMBIA GAS OF MASSACHUSETTS EXPRESSLY DISCLAIMS ANY AND ALL WARRANTIES OR REPRESENTATIONS OF ANY KIND, WHETHER ORAL, STATUTORY, EXPRESSED OR IMPLIED, INCLUDING, WITHOUT LIMITATION, WARRANTIES OF MERCHANTABILITY, USAGE, SUITABILITY OR FITNESS FOR A PARTICULAR PURPOSE. COLUMBIA GAS OF MASSACHUSETTS DOES NOT MAKE ANY REPRESENTATION OF ANY KIND REGARDING THE RESULTS TO BE ACHIEVED BY THE INSTALLATION OF ANY ENERGY EFFICIENCY IMPROVEMENT.

Limitation of Liability: Columbia Gas of Massachusetts and RISE Engineering’s liability are limited to the amount of the rebate and loan interest rate subsidy. Columbia Gas of Massachusetts is not liable for any indirect or consequential damages or for any damages connected with or resulting from participation in this offer.

Post Installation Work Verification: Columbia Gas of Massachusetts reserves the right to withhold payment of any rebate until the installed improvements have undergone a verification and inspection of the specified installation in order to ensure compliance with program requirements.

Measures not installed or not meeting program requirements: If the measures installed do not meet program requirements or are not installed, the customer is only liable for the interest costs and the repayment to Columbia Gas of Massachusetts for the amount of the HEAT Loan interest buy down associated with the measure, which can be paid out of the balance of the job. Interest costs for HEAT Loans are prepaid for the entire term by the sponsoring utility once the loan is closed. Prepaying the lender does not satisfy the interest cost reimbursement for non-installed or ineligible measures. The customer must contact the HEAT Loan Administrator (RISE Engineering) to work out repayment details.

Utility Energy Benefit: Columbia Gas of Massachusetts is entitled to 100% of the energy benefits associated with this incentive, excluding the value of energy cost savings to you, our customer, but including all rights to all associated Independent Systems Operator – New England, Energy, Capacity and Reserves Products, and you, our customer, agree to provide Columbia Gas of Massachusetts with such further documentation as we may request to confirm Columbia Gas of Massachusetts’ ownership of such benefits and Products. This statement does not apply to the customer rebate.

Changes in Program: Rebate and financing offer is for a limited time. Participation in the HEAT Loan Program is contingent on being approved for a loan from a Participating Lender. Rebates and financing are subject to funding availability and the program. Terms and Conditions are subject to change or cancellation without notice. This program offer for this year will end on December 31, 2015.

Mail or fax the above to:

**HEAT Loan
 c/o RISE Engineering
 60 Shawmut Road, Suite 2
 Canton, MA 02021
 Fax: 1-339-502-6345**

Phone: 1-800-232-0120

Email: ColumbiaGasMAinfo@thielsch.com