To determine measure eligibility for the HEAT Loan, submit the following:

1. This completed HEAT Loan Enrollment Form

2. Contractor proposal(s) for the eligible improvements you want to finance with the HEAT Loan (as applicable) including:
   a. Heating and Hot Water Systems
      i. Manufacturer, Model #, Size, and Energy Factor (EF) if applicable for the proposed heating system
      ii. Manufacturer, Model #, BTU Output and Efficiency Rating (AFUE) of the proposed heating system
   b. Weatherization Improvements
      i. Copy of the Action Plan obtained through an energy audit by the EnergyWise Program
      ii. An itemized proposal from a contractor, certified by the EnergyWise Program, for the recommended energy saving measures

3. Mail, e-mail or fax these items to:

   HEAT Loan Program, RISE Engineering, 1341 Elmwood Ave. Cranston, RI 02910
   Fax Number: 401-784-3710
   E-Mail: residentialinfo@riseengineering.com

RISE Engineering (RISE) will review the submitted proposal(s) and verify compliance with the Minimum Standards and Requirements. If the submitted proposal(s) meet the Minimum Standards and Requirements, RISE will provide the customer with a HEAT Loan Authorization Form indicating the amount of the HEAT Loan that the customer can apply for.

All improvements must be completed by an approved contractor.

Terms and Conditions:
Customer Eligibility: You must be a current National Grid residential customer eligible to participate in the EnergyWise Program. You must also be an owner of a one to four (1-4) family home that is not part of a larger complex and this must be the same residence receiving the energy efficiency improvements. Customer may only receive one HEAT Loan.

Incentives: The HEAT Loan amount shall be net of any additional rebates or incentives available through the EnergyWise Program.

No Warranties: NATIONAL GRID DOES NOT WARRANT THE PERFORMANCE OF ANY INSTALLED EQUIPMENT. NATIONAL GRID EXPRESSLY DISCLAIMS ANY AND ALL WARRANTIES OR REPRESENTATIONS OF ANY KIND, WHETHER ORAL, STATUTORY, IMPLIED, INCLUDING, WITHOUT LIMITATION, WARRANTIES OF MERCHANTABILITY, USAGE, SUITABILITY OR FITNESS FOR A PARTICULAR PURPOSE. NATIONAL GRID 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: National Grid and its program administrator’s liability are limited to the amount of the rebate and loan interest rate subsidy. National Grid 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: National Grid 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. If measures installed do not meet program requirements, the customer is liable for the repayment to the electric utility of the amount of the rebate interest buy down.

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. The program Terms and Conditions are subject to change or cancellation without notice. This program will end on December 31, 2013.

Glossary of Terms:
ARSU – Annual Fuel Utilization Efficiency
EF – Energy Factor

HEAT Loan Program – A financing program being offered by the EnergyWise Program to assist customers in financing energy savings improvements.

For questions regarding the Rhode Island HEAT Loan Program or for assistance in completing this form, contact RISE Engineering at 1-888-633-7947.
To submit your information for the HEAT LOAN PROGRAM, please tear off the attached document, fill out completely and then mail, e-mail, or fax to the address indicated on the form.

**Heat Loan Program Enrollment Form**

**Section 1: (To be completed by the Energy Assessment Provider/Auditor)**

- Date of Energy Assessment: 
- Company: RISE Engineering
- Advisor: 
- Company Phone #: 1-888-633-7947
- Site ID: # Units in Building: 
- Customer Name: 
- Address: 
- Town: 

**Existing Thermal Shell Conditions:**
- Insulation and/or Air Sealing Measures are recommended
- No Insulation or Air Sealing Upgrades are recommended
  - Already efficient
  - Site specific conditions prevented completion of upgrades, please indicate condition below:
    - Knob and tube wiring
    - Moisture concerns
    - Structural concerns

**Existing Heating System:**
- Furnace
- Steam Boiler
- Hot Water Boiler
- Natural Gas
- Oil
- Propane
- Electric
- Other:

**Existing Domestic Hot Water System:**
- Freestanding Tank
- Tankless
- Other:
- Natural Gas
- Propane
- Oil
- Electric
- Other:

**Section 2: (To be completed by Customer)**

- National Grid Electric Account #: 
- Gas Utility Account #: (utility account numbers may vary):
- Customer Name: 
- Home Phone: ( )
- Work Phone: ( )
- Cell Phone: ( )

**Installation Address:**
- City: 
- State: 
- Zip Code: 

**E-mail to be used in communication with you only:**
- # of Occupants in Household:
- Mailing Address if different:
- City: 
- State: 
- Zip Code: 

I am interested in applying for the HEAT Loan for the following Energy Efficiency Improvements:
- Insulation and/or Air Sealing Upgrades
- Energy Efficient Heating System Replacement
- Duct Sealing and Duct Insulation
- Energy Efficient Domestic Hot Water System
- ENERGY STAR® Thermostat(s)

**Name of Participating Lender:**

**Customer 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 Enrollment 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 noted on the reverse side of this form 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 laws and charges, can be obtained at www.nationalgridus.com/energywise. The actual amount of the HEAT Loan will be determined by the actual costs of all of the approved energy efficiency improvements and can range from $500-$25,000 depending on the lender you use. Some lenders require a $3000 minimum loan amount. The HEAT Loan amount shall be net of any additional rebates or incentives available through the EnergyWise 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, understand and agree to the Terms and Conditions printed on the reverse side of this form.

**Customer Signature: __________________ Date: __________________**

For questions regarding the Rhode Island HEAT Loan Program or for assistance in completing this form, contact RISE Engineering at 1-888-633-7947.
Financing offer is for a limited time. Participating in the HEAT Loan Program is contingent on being approved for a loan from a participating lender. Financing is subject to funding availability and the Terms and Conditions listed on the HEAT Loan Intake Form are subject to change or cancellation without notice. This program will end on December 31, 2013.

HEAT Loan Minimum Standards and Requirements.

Heating Systems and Thermostat Controls: Heating system proposal(s) must state manufacturer, model and Efficiency Rating (AFUE, HSPF, or COP) of the proposed heating system. Installments must be performed by a RI licensed heating contractor.

Distribution systems are limited and can only be covered when a customer is switching from Electric baseboard, Electric radiant heat or when a customer is switching from a steam boiler to a hot water boiler.

When switching from Electric baseboard or Electric radiant heat the new heating system must meet the minimum efficiency standards as listed in the following table. When switching from a steam boiler to a hot water boiler you must meet the following minimum standards listed below.

Section 2: (To be completed by Customer)

To finance a distribution upgrade with the HEAT Loan, new natural gas or propane boilers must be at least 90% AFUE to be eligible.

To finance a distribution upgrade with the HEAT Loan, new oil boilers must be at least 85% AFUE and an outdoor weather responsive control must be installed in conjunction with the boiler to be eligible for the HEAT Loan.

Not Covered: Oil tanks and air conditioning.

Insulation, Air Sealing, and Duct System Improvements

Insulation, air sealing, and ductwork (duct sealing and insulation) improvements must be recommended at the time of the audit and included on your Action Plan. All measures must be insulated in the EnergyWise Home Energy Assessment material and installation standards. Work must be completed by a contractor that has met all of the requirements and is currently eligible to provide program approved weatherization services in the EnergyWise Home Energy Assessment program.

Insulation proposals need to be itemized by type of work, insulation area, square footage, costs, and inches installed. Pre-Weatherization financing availability for knob and tube remediation only (up to $100,000 max) must provide a proposal from a licensed electrician).

Domestic Hot Water Systems: Domestic hot water systems must meet the minimum efficiency standards as noted in the following table to be eligible for the HEAT Loan.

Section 1: (To be completed by the Energy Assessment Provider/Auditor)

Date of Energy Assessment: Company: RISE Engineering
Advisor: Company Phone #: 1-888-633-7947
Site ID: # Units in Building:

Customer Name: Address: Town:

Existing Thermal Shell Conditions:

Insulation and/or Air Sealing Measures are recommended
No Insulation or Air Sealing Upgrades are recommended
Already efficient
Site specific conditions prevented completion of upgrades, please indicate condition below:
Knob and tube wiring
Moisture concerns
Structural concerns

Existing Heating System:

Furnace
Steam Boiler
Hot Water Boiler
Other:

Natural Gas
Oil
Propane
Electric
Other:

Existing Domestic Hot Water System:

Freestanding Tank
Indirect
Tankless
Other:

Natural Gas
Propane
Oil
Electric
Other:

Section 2: (To be completed by Customer)

National Grid Electric Account #:

Gas Utility Account # (utility account numbers may vary):

Customer Name: Home Phone: ( )
Work Phone: ( )
Cell Phone: ( )

Installation Address:

City: State: Zip Code:

E-mail (to be used in communication with you only): # of Occupants in Household:

Mailing Address (if different): City:
State: Zip Code:

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

Insulation and/or Air Sealing Upgrades
Energy Efficient Heating System Replacement
Duct Sealing and Duct Insulation
Energy Efficient Domestic Hot Water System
ENERGY STAR® Thermostat(s)

Name of Participating Lender:

Customer 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 Enrollment 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 noted on the reverse side of this form 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 www.nationalgridusa.com/energywise. The actual amount of the HEAT Loan will be determined by the actual costs of all of the approved energy efficiency improvements and can range from $500-$25,000 depending on the lender you use. Some lenders require a $300 minimum loan amount. The HEAT Loan amount shall be net of any additional rebates or incentives available through the EnergyWise 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, understand and agree to the Terms and Conditions printed on the reverse side of this form.

Customer Signature: Date: 

For questions regarding the Rhode Island HEAT Loan Program or for assistance in completing this form, contact RISE Engineering at 1-888-633-7947.

To submit your information for the HEAT LOAN PROGRAM, please tear off the attached document, fill out completely and then mail, e-mail, or fax to the address indicated on the form.
The HEAT loan is available to qualified customers participating in the EnergyWise Home Energy Assessment Program and is designed to promote the installation of high efficiency improvements. Customers are eligible to apply for a 0% loan and obtain applicable utility rebates for the measures installed. Customers must be owners of one- to four- family homes and have a current residential gas and/or electric account with National Grid. Units in a condo complex with a condo board are not eligible for a HEAT Loan. Condo complexes are served through the utility’s multi-family program.

1. Complete an EnergyWise Home Energy Assessment and receive a HEAT Loan Enrollment Form. Visit www.nationalgridus.com/energywise for more information and a list of participating lenders. Call 1-888-633-7947 to schedule the Home Energy Assessment, or if you have any questions concerning the eligible improvements and process.

2. If you choose to obtain pre-approval from one of the HEAT Loan participating lenders, loans are unsecured or secured depending on the lender. Refer to the lender list for pre-approval and loan options.

3. Obtain signed, itemized contractor proposals for the eligible efficiency improvements that you want to finance. The customer is responsible for obtaining proposals from qualified contractor(s) for the eligible efficiency improvements. Do-it-yourself installations are not eligible for HEAT Loan financing. Review the Minimum Standards and Requirements below and share a copy with your contractor(s).

4. Choose the contractor(s) you want to use and provide copies of the contractor proposals to your HEAT Loan Administrator for eligibility review and approval. The HEAT Loan Administrator will review the contractor(s) proposal(s) the customer submits for the HEAT Loan. The HEAT Loan Administrator will contact the customer if any paperwork is incomplete or does not meet the eligibility requirements. Mail or Fax the following information to your HEAT Loan Administrator for eligibility review and approval:

   a. Original, white copy, of the completed and signed HEAT Loan Enrollment Form provided at the Home Energy Assessment with section 2 completed and signed.
   b. Contractor Proposal(s) for the eligible improvements you want to finance along with all required supporting documentation as described in the Minimum Standards and Requirements below.
   c. Mail, e-mail or fax these items to:

   HEAT Loan Program, RISE Engineering, 1341 Elmwood Ave. Cranston, RI 02910
   Fax Number: 401-784-3710
   E-Mail: residentialinfo@riseengineering.com

   RISE Engineering (RISE) will review the submitted proposal(s) and verify compliance with the Minimum Standards and Requirements. If the submitted proposal(s) meet the Minimum Standards and Requirements, RISE will provide the customer with a HEAT Loan Authorization Form indicating the amount of the HEAT Loan that the customer can apply for.

   Maximum loan amounts and loan type can vary by participating lender.

   a. Mail, fax or e-mail these items to:

   HEAT Loan Program, RISE Engineering, 1341 Elmwood Ave. Cranston, RI 02910
   Fax Number: 401-784-3710
   E-Mail: residentialinfo@riseengineering.com

   1. This completed HEAT Loan Enrollment Form
   2. Contractor proposal(s) for the eligible improvements you want to finance with the HEAT Loan (as applicable) including:
      a. Heating and Hot Water Systems
         i. Manufacturer, Model #, Size, and Energy Factor (EF) of the proposed heating system
         ii. Itemized list of all work and equipment to be installed in association with the heating system (plumbing, electrical, disposal and specialized controls and thermostats).
         iii. The cooling or air conditioning components of any system cannot be funded using the HEAT Loan.
      b. Weatherization Improvements
         i. Copy of the Action Plan obtained through an energy audit by the EnergyWise Program
         ii. An itemized proposal from a contractor, certified by the EnergyWise Program, for the recommended energy saving measures

   b. Mail, fax or e-mail these items to:

   HEAT Loan Program, RISE Engineering, 1341 Elmwood Ave. Cranston, RI 02910
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   1. This completed HEAT Loan Enrollment Form
   2. Contractor proposal(s) for the eligible improvements you want to finance with the HEAT Loan (as applicable) including:
      a. Heating and Hot Water Systems
         i. Manufacturer, Model #, Size, and Energy Factor (AFUE) of the proposed heating system
         ii. Manufacturer, Model #, Size, and Energy Factor (EF) of the proposed water heater
         iii. Itemized list of all work and equipment to be installed in association with the heating system (plumbing, electrical, disposal and specialized controls and thermostats).
   b. Weatherization Improvements
      i. Copy of the Action Plan obtained through an energy audit by the EnergyWise Program
      ii. An itemized proposal from a contractor, certified by the EnergyWise Program, for the recommended energy saving measures

To determine measure eligibility for the HEAT Loan, submit the following:

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   a. Heating and Hot Water Systems
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   Limitation of Liability: National Grid and its program administrator’s liability are limited to the amount of the rebate and loan interest rate subsidy. National Grid 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: National Grid 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. If measures installed do not meet program requirements, the customer is liable for the repayment to the electric utility of the amount of the rebates.

   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. The program Terms and Conditions are subject to change or cancellation without notice. This program offer will end on December 31, 2013.

   Glossary of Terms:
   AGSIE – Annual Gas Utilization Efficiency
   EF – Energy Factor
   HEAT Loan Program – A financing program being offered by the EnergyWise Program, for the recommended energy saving measures

   Limitation of Liability:
   NATIONAL GRID EXPRESSLY DISCLAIMS ANY AND ALL WARRANTIES OR REPRESENTATIONS OF ANY KIND, WHETHER ORAL, STATUTORY, EXPRESSED OR IMPLIED, INCLUDING, WITHOUT LIMITATION, WARRANTIES OF MERCHANTABILITY, USABILITY, SUITABILITY OR FITNESS FOR A PARTICULAR PURPOSE. NATIONAL GRID DOES NOT MAKE ANY REPRESENTATION OF ANY KIND REGARDING THE RESULTS TO BE ACHIEVED BY THE INSTALLATION OF ANY ENERGY EFFICIENCY IMPROVEMENT.

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

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