

Customer Rebate Application Instructions

This Customer Rebate Application is required for participation in the Commercial Prescriptive Rebate Program (Rebate Program) for projects installing qualifying non-lighting measures. The Lighting Workbook required for lighting projects is available online at www.empowerSCbusiness.com. Complete participation information and eligibility specifications are included in the 2023 Commercial Prescriptive Rebate Program Manual, also available at www.empowerSCbusiness.com.

This Customer Rebate Application packet contains the following parts:

- General Information
- Rebate Payment Information
- Rebate Worksheet

To participate in this Rebate Program, please follow the following steps:

1. **Read** the 2023 Program Manual for a complete description of program eligibility requirements and the participation process.
 2. **Read** the Terms and Conditions document and sign.
 - Signing the Terms and Conditions document accepts the terms and conditions of this Rebate Program.
 3. **Purchase and Install** qualifying equipment and/or initiate and complete work between December 1, 2022 and November 30, 2023.
 4. **Complete** the following forms included with this Customer Rebate Application:
 - **General Information** – Include all required customer and account information.
 - **Rebate Payment Information** – Rebates will be mailed to customer's electric account billing address. If customer would prefer for the check to be designated to someone other than the customer, complete the Payment Release Information on page three of this Customer Rebate Application.
 - **Rebate Worksheet** – Include all required product information including: product type, install date, dealer name, manufacturer, model number(s), efficiency, size, quantity, and rebate amount. Dealers or contractors may assist with the completion of the rebate worksheet.
 5. **Complete** any required supplemental forms for the energy efficiency measures being installed, if applicable.
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5. **Submit** a current W9 form for the customer applying for the rebate.
 6. **Retain** a copy of all completed Customer Rebate Application forms and all required documentation, such as invoices and contracts. Submitted Customer Rebate Applications will become the property of Santee Cooper.

Submit the completed forms and required documentation, including dated sales receipt or invoice, by November 30, 2023 to:

Santee Cooper Energy Services
305-A Gardner Lacy Road
Myrtle Beach, SC 29579

Email: commercial.energy@santeecooper.com

Please enter in email subject line – **SECURE: Rebate Application**

For More Information. For more information about this Rebate Program, measure eligibility, rebates, or other Santee Cooper programs please contact us:

- **Website:** www.empowerSCbusiness.com
- **Trade Ally Portal:** www.empowerSC4business.com
- **Email:** commercial.energy@santeecooper.com
- **Phone:** (843)347-3399 ext. 3910 (Horry and Georgetown Counties)
and (843)761-8000 ext. 3910 (Berkeley County)

General Information

Important: This form is not for lighting projects. For lighting projects, please use the Lighting Workbook. (Note: Retrofit lighting projects **REQUIRE** pre-inspection before work can be started.)

Energy efficiency measures must be purchased, installed, and/or completed at a qualifying customer facility **prior** to submitting the Customer Rebate Application unless otherwise noted in the Equipment Catalog. Please allow 6 weeks for the Customer Rebate Application and rebate processing following complete documentation submittal and post-installation inspection procedures. Rebates will not be paid for ineligible or incomplete Customer Rebate Applications.

Business Name (as it appears on Santee Cooper Bill) _____ Federal Tax ID (EIN) or Social Security # _____

Santee Cooper Account Number(s) where measure(s) to be installed (location on Santee Cooper Bill) _____

Santee Cooper Meter Number(s) where measure(s) to be installed (location on Santee Cooper Bill) _____

Address where measure(s) to be installed _____ City _____ State _____ Zip _____

Contact Name _____ Contact Phone Number _____ Contact Email Address _____

Electronic Account Billing Address (if different from the installation address) _____ City _____ State _____ Zip _____

Is Contractor a Santee Cooper Trade Ally? Yes No

Contractor Name _____

Building Information

Primary building use:

- | | | |
|--|--|--|
| <input type="checkbox"/> Automotive Facility | <input type="checkbox"/> Hotel | <input type="checkbox"/> Police/Fire Station |
| <input type="checkbox"/> Convention Center | <input type="checkbox"/> Library | <input type="checkbox"/> Post Office |
| <input type="checkbox"/> Court House | <input type="checkbox"/> Manufacturing Facility | <input type="checkbox"/> Religious Building |
| <input type="checkbox"/> Dining: Bar Lounge/Leisure | <input type="checkbox"/> Motel | <input type="checkbox"/> Retail |
| <input type="checkbox"/> Dining: Cafeteria/Fast Food | <input type="checkbox"/> Motion Picture Theater | <input type="checkbox"/> School/University |
| <input type="checkbox"/> Dining: Family | <input type="checkbox"/> Multi-Family Housing | <input type="checkbox"/> Sports Arena |
| <input type="checkbox"/> Dormitory | <input type="checkbox"/> Museum | <input type="checkbox"/> Town Hall |
| <input type="checkbox"/> Exercise Center | <input type="checkbox"/> Office | <input type="checkbox"/> Transportation |
| <input type="checkbox"/> Gymnasium | <input type="checkbox"/> Parking Garage | <input type="checkbox"/> Warehouse |
| <input type="checkbox"/> Health Care - Clinic | <input type="checkbox"/> Penitentiary | <input type="checkbox"/> Workshop |
| <input type="checkbox"/> Hospital | <input type="checkbox"/> Performing Arts Theater | <input type="checkbox"/> Other _____ |

Building Size: _____

Number of Floors: _____

Year Built: _____

Percent Conditioned: _____

Operating Hours: _____

Temperature Set-points:

	<u>Heating</u>	<u>Cooling</u>
Occupied	_____ °F	_____ °F
Un-occupied	_____ °F	_____ °F

Rebate Payment Information

Mail rebate check to: Billing Address Other (complete release below)

Rebate check reference (15 character maximum)

3rd Party Release (Payment Release Information)

Important: Complete this section only if rebate payment is to be directed to someone other than the customer indicated above. Please note that the federal government may require that a 1099 be issued to you, the customer, for the rebate amount paid to your contractor. Please consult with your tax professional for tax implications.

I AM AUTHORIZING THIS REBATE PAYMENT TO THE THIRD PARTY NAMED BELOW AND I UNDERSTAND THAT I WILL NOT BE RECEIVING THE REBATE PAYMENT CHECK FROM SANTEE COOPER. I ALSO UNDERSTAND THAT MY RELEASE OF PAYMENT TO THE THIRD PARTY DOES NOT EXEMPT ME FROM THE REBATE REQUIREMENTS OUTLINED IN THE APPLICATION.

Authorized by (please print)

Signature of Authorized

Date

Check should be made payable to:

Payee Business Name

Contact Phone Number

Payee Federal Tax ID (EIN) or Social Security Number

Payee Mailing Address

City

State

Zip

Rebate Worksheet

Important: This form is to be completed and submitted to Santee Cooper with the Customer Rebate Application. Please refer to the Equipment Catalog(s) for measure eligibility requirements, rebate amounts and codes. Dealers or contractors may assist in the completion of this form. Attach additional sheets as necessary.

Parameter	Measure 1	Measure 2	Measure 3
Equipment code			
Project type (Retrofit or New Construction)			
Installation date			
Facility Location (Distance from oceanfront)			
Location of installed measure (e.g. roof, mechanical room)			
EE Measure end use (e.g. supply fan, CHW pump)			
Age of replaced equipment (for retrofits)			
Replaced (existing) equipment Manufacturer			
Replaced (existing) equipment Model number			
New equipment Dealer name			
New equipment Manufacturer			
New Equipment Model number			
Annual operating hours ¹			
Efficiency(ies) (as described in Equipment Catalog)			
EE Measure size (as described in Equipment Catalog)			
EE Measure rebate (\$) (e.g. HVAC: \$50/ton*10 tons=\$500)			
Number of measures			
Total rebate (\$) (# of Measures*Measure Rebate)			

¹IF VFD application, please specify the equipment schedule(s)

Customer Rebate Application Checklist

Before submitting this Customer Rebate Application please verify the following:

1. Did you read and understand the eligibility requirements in the Equipment Catalog?
2. Have you included a dated sales invoice?
3. Did you attach any additional documentation listed in the Equipment Catalog?
4. Did you include your account number?
5. Did you sign the Terms and Conditions Form?

SEND COMPLETED CUSTOMER REBATE APPLICATIONS TO:

Mail: Santee Cooper Energy Services
305-A Gardner Lacy Road
Myrtle Beach, SC 29579

Email: commercial.energy@santeecooper.com

Please enter in email subject line – **SECURE: Rebate Application**

2023 Commercial Rebate Programs Terms and Conditions

Santee Cooper is implementing the Commercial Rebate Program to provide customers with rebates to facilitate the installation of qualifying energy-efficient measures. The following terms and conditions apply to the program:

Eligibility To participate in the applicable Santee Cooper Commercial Rebate Program (the “Rebate Program”), Participant must comply with the eligibility requirements and program participation requirements as set forth in the Program Manual for the Rebate Program provided with these Terms and Conditions.

Other Conditions No agreement or understanding to modify the terms and conditions of this Rebate Program shall be binding upon Santee Cooper unless in writing and signed by Santee Cooper’s authorized agent. Notwithstanding the foregoing, the terms of the Rebate program are subject to change or modification by Santee Cooper with or without notice at any time. Santee Cooper reserves the right to discontinue the Rebate Program without notice.

Rebate Program payments will be in the form of a check and made out to the Participant or its designee. Rebates will be processed approximately 45 days after Santee Cooper or its agent’s timely receipt of a completed rebate form along with proof of sale. Incomplete or inaccurate applications are subject to delay or denial of Rebate. Santee Cooper reserves the right to make final determination in its sole discretion of Rebate Program eligibility and amount of rebate. Should Participant fail to provide a valid taxpayer identification number, any payment provided under the Rebate Program will be subject to withholding pursuant to federal regulations.

All materials issued to the Applicant by Santee Cooper as information pertaining to this Rebate Program, including but not limited to, the Program Manual and appendices thereto (collectively the “Program Manual”), shall be deemed included in these terms and conditions as if set forth verbatim herein. To the extent there is any conflict between the language of the Program Manual and terms set forth herein, the terms set forth herein shall prevail.

Indemnification Participant will indemnify and hold harmless Santee Cooper and its affiliates, subsidiaries, joint ventures, officers, directors, employees, agents (including its program administrator Resource Innovations, Inc. (“Resource Innovations”)), successors, and assigns (collectively the “Indemnified Parties”) from and against all liability claims and demands, including any damages, losses, liabilities or expenses (including without limitation court costs and reasonable attorneys’ fees) which arise as a result of the Participant’s action or inaction which relates in any way to this Rebate Program, including the submission of fraudulent rebates. Notwithstanding the foregoing, this indemnification is in addition to any indemnity and/or insurance obligations between the Participant and the Indemnified Parties.

IN NO EVENT SHALL THE INDEMNIFIED PARTIES BE LIABLE TO PARTICIPANT FOR ANY CONSEQUENTIAL, INCIDENTAL, PUNITIVE, OR DIRECT DAMAGES, INCLUDING LOST PROFITS, ARISING FROM OR OTHERWISE IN CONNECTION WITH THIS REBATE PROGRAM.

No Warranties SANTEE COOPER AND RESOURCE INNOVATIONS MAKE NO REPRESENTATIONS, WARRANTIES, OR GUARANTEES OF ANY KIND WITH RESPECT TO THE QUALITY, DESIGN, MANUFACTURE, CONSTRUCTION, SAFETY, PERFORMANCE, INSTALLATION, OR EFFECTIVENESS OF EQUIPMENT CONNECTED TO THE REBATE PROGRAM. SANTEE COOPER AND RESOURCE INNOVATIONS DISCLAIM ALL WARRANTIES, EXPRESSED OR IMPLIED, INCLUDING WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, USE OR APPLICATION AND NON-INFRINGEMENT WITH RESPECT TO THE EQUIPMENT.

Responsibility for delivery and workmanship related to any materials or equipment that participant procures under the rebate program exclusively rests with participant or other third party. **NEITHER SANTEE COOPER NOR RESOURCE INNOVATIONS ASSUMES ANY RESPONSIBILITY FOR THE REPRESENTATIONS, WARRANTIES OR GUARANTEES WITH RESPECT TO THE QUALITY, DESIGN, MANUFACTURE, CONSTRUCTION, SAFETY, PERFORMANCE, INSTALLATION, OR EFFECTIVENESS OF THE EQUIPMENT OR OVERSIGHT OF CONTRACTOR SERVICES UTILIZED BY PARTICIPANT.** Neither Santee Cooper, nor Resource Innovations, guarantees that installation and operation of the equipment will result in reduced energy usage or cost savings.

Representations and Warranties Participant represents, warrants, and covenants that it has and/or shall undertake all of its duties, and those matters incident thereto, under this rebate program in a good and workmanlike manner, and in a manner that will fully comply with all applicable local, state, and federal laws and regulations; and, that it is legally authorized by license or otherwise, insofar as such authorization is required, to perform all duties required by it under this rebate program, and that its participation in this rebate program will not result in the breach of any contract to which it is a party.

Neither Santee Cooper nor Resource Innovations is responsible for any tax liability which may be imposed on the Participant as a result of any rebate payment. Participant may be responsible for the tax reporting to the IRS of any rebate payments directed to third parties. Neither Santee Cooper nor Resource Innovations is providing tax advice, and any communications to such parties is not intended to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.

Participant agrees that Santee Cooper shall have the right, upon written notice to Participant, to examine all records and data of Participant pertaining to its participation in the Rebate Program.

The laws of the State of South Carolina shall govern the interpretation, validity, and effect of these Terms and Conditions, the parties' performance thereunder, and all matters incident thereto.

By signing below, applicant acknowledges and agrees that:

- I have read and understand all Terms and Conditions, participation procedures, customer eligibility, and measure qualifications in the Program Manual for Santee Cooper's 2023 Commercial Rebate Program being applied for. I have also read and understand all Terms and Conditions in this form.
- I certify as the building owner or the owner's authorized representative that all the information contained within submitted applications is true and factual.
- The undersigned applicant shall defend, protect, indemnify and hold harmless Santee Cooper and its board members, officers, employees, servants, and agents (the "Indemnified Parties") against all claims, losses, expenses, damages, demands, judgments, causes of action, suits, and liability of every kind and character whatsoever ("claims") arising out of or incident to, or related in any way to, directly or indirectly, participation in the Commercial Rebate Program; provided however, that applicant shall not be required to indemnify and hold harmless any Indemnified Party against claims adjudicated to have been caused by the Indemnified Party's gross negligence or willful misconduct.
- The federal government may require that a 1099 be issued to you, the customer, for the rebate amount paid to you or your contractor. Please consult with your tax professional for tax implications.

Business Classification (Must Check One Only, required for all businesses, including non-profits):

Corporation Partnership Sole Proprietor/Individual LLC Non-Profit Other _____

Business Name: _____

Federal Tax ID # (9 digits): _____ Date _____

Signature: _____

Name (please print): _____

Title: _____

Send form to:

Email: www.empowerSCbusiness.com

Mail: Santee Cooper Energy Support Services
305-A Gardner Lacy Road
Myrtle Beach, SC 29579

Please enter in email subject line – **SECURE: Terms and Conditions**