



TRADE ALLY PROGRAM REQUIREMENTS

Completion of the following application is the initial step to be considered for participation in Puget Sound Energy's Trade Ally Program. All applicants must meet the following requirements prior to consideration.

Trade Ally has been in business selling or providing energy efficient services or equipment for at least 5 years.

Trade Ally must be in good financial standing with PSE with no delinquent or unpaid accounts.

Trade Ally maintains an active Washington State Business License.

Trade Ally is a General or Specialty Contractor, and holds an active Certificate of Registration with the Washington State Department of Labor and Industries under the same business name for no less than twelve (12) consecutive months (does not apply for Home Raters).

Trade Ally must provide proof of General Liability and Auto Coverage insurance with application. Upon approval and certification by PSE, trade ally must document General Liability and Auto coverage with minimum limits of \$1,000,000 up to \$2,000,000 per occurrence (including Broad Form Property Damage, Contractual Liability, no Collapse or Underground exclusions and Stop Gap coverage); PSE must be listed as Additional Insured on General and Auto Liability; limits may differ based on services performed.

Trade Ally must maintain Workers' Compensation and Employer's Liability insurance, regardless of whether such insurance is mandatory or merely elective under the law. (Worker's compensation optional owner coverage is not required by PSE).

Trade Ally must provide two customer references and one trade partner reference with whom the trade ally has had an established business relationship.

Trade Ally must submit a \$100 application fee upon acceptance in the program.

Trade Ally Business Contact Information

Form with fields for Date, Name of Business, Principal/Owner, Business Classification, Business Address, City, Zip, Mailing Address, Mailing City, Mailing Zip, Contact if other than business owner, Fax, Email Address, Company URL.

Business Type: Contractor, Dealer, Distributor, Engineering Firm, Manufacturer, Manufacturer's Representative, Retailer, Trade Group, Other.

Trade Ally Business Requirements (Please attach copies)

WA State Business License No., Original Issue Date, Expiration Date; WA Dept. of Labor and Industries Contractor's Registration No. (where applicable), Original Issue Date, Expiration Date.

Insurance General Information (please attach copies)

General Liability Insurance Company Name, Policy No., Expiration Date; Auto Insurance Company Name, Policy No., Expiration Date.

Business Experience

Number of years in Business: Number of sales employees: Products your company installs:

Services (Please check the following products and services your business is qualified to provide)

Single Family Residential: Backup Generators, HVAC and/or Water Heat, Solar PV, Home Rating (New Construction), Windows, Weatherization; Multifamily Retrofit: HVAC and/or Water Heat, Lighting, Weatherization, Windows; Commercial: HVAC, Lighting.

## Certification Requirements

Applicants for select services must document that company personnel have secured the certification(s) listed below to qualify to participate in PSE Trade Ally network. Please attach proof of **Certification** for each individual applicant from your organization. Is your certification attached,  No  Yes

**Trade Certifications:**

- **Photovoltaic** - NABCEP Solar PV certification
- **Residential New Construction** - Residential Energy Services Network (RESNET) Certification using Home Energy Rating System (HERS) or Built Green Standards

Type of Certificate:	Name listed on certificate:	Issue date of
Type of certificate:	Name listed on certificate:	Issue date of
Type of certificate:	Name listed on certificate:	Issue date of

Please provide a brief overview of all additional relevant education and/or training in the last five (5) years.

**For additional applicants affiliated with your organization, attach a list of names, accreditations/certifications, and relevant training in the past five (5) years.**

## Experience

List your experience selling and installing energy efficient products and services:

Please describe your experience with Puget Sound Energy's Energy Efficiency Programs:

## References

Please list below **names** and **addresses** of one trade partner with whom you have an established business relationship and 2 customers to whom service has been rendered within the past year. A Puget Sound Energy Representative will contact these individuals to ask questions regarding their experience with your organization and may request to schedule an appointment with the references to review associated workmanship and business practices. Note: PSE may also contact and review additional customers who received services from your company through a PSE program.

Trade Partner:	Email:	Phone:
Address: <span style="float: right;">City: <span style="float: right;">Zip:</span></span>	Type of Work:	Date
Service Provided or Products installed:		
Customer Name:	Email:	Phone:
Address: <span style="float: right;">City: <span style="float: right;">Zip:</span></span>	Type of Work:	Date
Service Provided or Products installed:		
Customer Name:	Email:	Phone:
Address: <span style="float: right;">City: <span style="float: right;">Zip:</span></span>	Type of Work:	Date
Service Provided or Products installed:		

## Application Fees

**There is a \$100.00 application fee that will be collected by PSE if approved to participate in the Trade Ally program**

## Acknowledgment

By submitting this application, (i) I represent that the information provided is true, (ii) I promise to notify Puget Sound Energy (PSE) of any changes, (iii) I acknowledge that completion of this application does not guarantee enrollment into PSE Energy Efficiency training program, (iv) I understand if accepted, I will also have to complete a Trade Ally Agreement for my company and that all trainees must successfully complete the required Training Program prior to being approved as a PSE Certified Trade Ally.

## Authorization

Applicant name (please print):	Applicant Signature:	Applicant Title: