

# Trade Ally Training and Mileage Incentive Application



EPS New Construction | Incentive Application | Form 625<sub>TA</sub>

### Steps to completion:

- 1 Attend** an educational training between January 1, 2021 and December 31, 2021.
- 2 Complete** and sign application, including:
  - Attached proof of purchase
  - Completed W-9
  - Your signature
- 3 Submit** completed form and W-9 to:  
**Energy Trust of Oregon**  
**EPS New Construction**  
 4105 SE International Way  
 Suite 505  
 Milwaukie, OR 97222  
 1.855.575.4315 fax  
[eps@energytrust.org](mailto:eps@energytrust.org)

### Need-to-know information:

- Please allow up to 60 days for your receipt of payment. If a W-9 is required the payment will be made to the name on the W-9.
- Energy Trust must receive applications within **90 days** from the date of completed training or trip.
- Energy Trust will pay training cost up to a maximum of \$250 per individual and up to more than \$1,200 per organization per year.
- Incentive will not exceed the cost paid for the training and will take into consideration discounts and special offers with other organizations providing training funds.
- To ensure training will be approved for incentives, contact the program for confirmation prior to taking the training.
- Mileage reimbursement is for outlying rural territories in approved Energy Trust Regions. Maximum annual cap of \$2,000, paid at the current federal mileage rate.

### Trade Ally Information

*Energy Trust Use Only*

PT ID

Company Name

Company Contact Name

Email Address

Mailing Address

City

State

Zip

Phone

Home

Work

Cell

Fax

Receipt or proof of purchase is included

### Training Information

Training	Date	Location	Attendee Name	Cost of Training
				\$
				\$
				\$
				\$
				\$
				\$
<b>Total Training Incentive Requested</b> (not to exceed: \$250 per individual or \$1,200)				\$

### Mileage Reimbursement

Date	From Address	To Address	Total Mileage	Reason for Trip

Travel must be for pre-approved purposes and within Energy Trust Regions 2,6,7,9,10 and/or 11.

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## Acceptance of Terms and Conditions

*By signing this application, I verify that I am authorized to submit this application on behalf of the applicant listed below and that the information presented herein is true and correct. I understand and agree to the requirements and terms and conditions as set forth herein.*



Trade Ally Authorized Representative Signature

Date

## Terms and Conditions

**APPLICATION:** Incentives are available for training attended between January 1, 2021 and December 31, 2021. Funds for the Incentives are limited and available on a first-come first-served basis. Application must be received by the Program within 90 days of training in order to be eligible for incentives.

**ELIGIBILITY:** Incentives for educational training are available to Trade Allies interested in conducting services for homes in the Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas or Avista service territories. Trade Allies must complete one EPS New Construction project in the same calendar year for which the training incentive was provided.

**VERIFICATION:** Energy Trust or its agent will, in Energy Trust's sole discretion, verify that applicant successfully completed the training and passed the competency test, if applicable.

**PAYMENT:** The Incentives will be promptly paid on (i) submission and approval of the completed Trade Ally Training Incentive Application, (ii) itemized receipt for training and (iii) W-9. Payments will be made to the Applicant and must match name on W-9, if W-9 is required. Please allow up to 60 days for receipt of payment after verification and inspection.

**INCENTIVE AMOUNT:** Incentive funds paid will not exceed the actual cost of training completed by the Trade Ally. The training incentive is limited to the cost of training per individual with a maximum incentive not to exceed \$250, whichever is less. No more than \$1,200 in incentives will be provided to one organization per year.

**INFORMATION RELEASE:** The Applicant understands and agrees that Energy Trust and/or its representatives may include a description of this incentive, including the Applicant's name, the Applicant's company name, services provided, project cost and energy savings, in reports, studies, and other documentation required by Energy Trust, its Board of Directors, the Oregon Legislature, the Oregon Public Utility Commission, Oregon Department of Energy and the Oregon Legislature. Energy Trust will treat all other information gathered in as confidential and report it only in the aggregate.

**TAX LIABILITY:** Energy Trust is not responsible for any tax liability imposed on the Applicant as a result of payment of the incentives. Energy Trust is not providing tax advice, and any communication by Energy Trust is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.

**NO ENDORSEMENT:** Energy Trust does not endorse any particular manufacturer, contractor, equipment or system. The fact that the names of particular manufacturers, contractors, equipment or systems may appear on this application does not constitute an endorsement. Manufacturers, contractors, equipment, or systems not mentioned are not implied to be unsuitable or defective in any way.

**DISCLAIMER/NO LIABILITY:** Applicant understands that, while Energy Trust is providing Applicant with funding for the incentives payment, Energy Trust is not supervising Applicant or Applicant's training nor is Energy Trust responsible in any way for proper training or performance by Applicant. Energy Trust is simply providing funding to assist Applicant in education and training. Energy Trust does not guarantee any particular energy savings results by its approval of the Application or by any other of its actions.

**SURVIVAL OF TERMS AND CONDITIONS:** Unless stated otherwise in this document, regardless of whether or not this application is approved, these terms and conditions shall survive the payments of any incentive payments provided hereunder.

### Resources

Link to W-9  
[www.energytrust.org/w9](http://www.energytrust.org/w9)

Additional EPS New Construction Resources  
[www.energytrust.org/trade-ally/programs/new-homes/resources/](http://www.energytrust.org/trade-ally/programs/new-homes/resources/)

### Contact Us

Energy Trust of Oregon EPS New Construction  
Email: [eps@energytrust.org](mailto:eps@energytrust.org)  
Phone: 1.877.283.0698