



# HEAT Loan intake form



**For a successful application,** you must include your **contractor proposal** and **required documentation**. Keep a copy for yourself as well.

## Section 1 (To be completed by the LOAN APPLICANT/OWNER)

Is the installation address occupied by the owner or renter?  Owner  Renter

Has your project been approved for participation in the Renovations & Additions Program?  Yes  No

New Construction  Yes  No

Loan applicants name(s) \_\_\_\_\_  
*(as you would like it to appear on your bank application)*

Installation address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_ ZIP code \_\_\_\_\_

Landlord/owner address (if different) \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_ ZIP code \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

I am interested in applying for the HEAT Loan for the following energy efficiency improvements:

**Note: You must include a proposal and all supporting documents required for any improvements selected. Equipment upgrade must be of residential grade (commercial-grade equipment is not eligible).**



Residential battery storage



Domestic water heating equipment



Air source or ground source heat pumps



Insulation and pre-weatherization barriers



Condensing boilers and furnaces



Replacement windows

## Section 2 (Existing conditions filled out by Energy Specialist)

Date of energy assessment (if applicable) \_\_\_\_\_

Site ID # \_\_\_\_\_

Energy Specialist & company \_\_\_\_\_

Electric account # \_\_\_\_\_

# Units in building  1  2  3  4  \_\_\_\_\_

Gas account # (if applicable) \_\_\_\_\_

Condo  Yes  No Complex name \_\_\_\_\_

Address/town \_\_\_\_\_

### Existing thermal shell conditions

Insulation and/or air sealing measures are recommended

No insulation or air sealing upgrades are recommended

Site-specific conditions that prevent completing upgrades (indicate condition below)

Knob and tube wiring

Moisture concerns

Structural concerns

Other \_\_\_\_\_

Combustion safety concerns

Other \_\_\_\_\_

### Existing windows

Number of single pane windows eligible for replacement and financing \_\_\_\_\_

Existing windows not eligible for replacement financing

Project approved for New Construction Program use?

Yes  No

### Existing heating system (to be completed by energy specialist)

Type  Heat Pumps

Fuel  Natural gas

Condensing Furnace

Propane

Non-Condensing Furnace

Oil

Condensing Boiler

Electric

Non-Condensing Boiler

Other \_\_\_\_\_

Steam Boiler

New Construction

Other \_\_\_\_\_

### Existing domestic water heater

Type  Freestanding tank

Fuel  Natural gas

Tankless

Propane

Indirect tank

Oil

Other \_\_\_\_\_

Electric

Other \_\_\_\_\_

## Loan applicant/owner acknowledgment

I have read, understood, and agree to the loan applicant acknowledgment and 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 financing.

Loan applicant signature(s) \_\_\_\_\_ Date \_\_\_\_\_

For questions regarding the HEAT Loan Program or for assistance in completing this form contact your HEAT Loan Program Administrator shown on the bottom of Page 2 of this form.

**Loan applicant acknowledgment:**

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

If desired, I 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 my HEAT Loan Administrator noted below and receive a HEAT Loan Authorization Form.

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](http://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 Sponsor(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.**

**Terms and conditions:**

The Sponsors of the Mass Save Program are the following utilities and Program Sponsors, and will henceforth in this document be referred to as “the Sponsors”: Berkshire Gas, Cape Light Compact, Eversource, Liberty, National Grid, and Unitil. By submitting the rebate application, the customer agrees to abide by these Terms and Conditions.

**Customer eligibility:** Resident of the unit must be a current residential customer eligible to participate in the Mass Save Program. The applicant must be the owner of the home receiving the energy efficiency improvements. Customers can take advantage of this loan program multiple times, however the combined loans cannot exceed the loan maximum of \$25,000 with the exception of second loans for air and ground source heat pumps, which will be approved up to an additional \$25,000.

**Municipal electric customers that heat with natural gas** provided by Eversource, National Grid, and Liberty are eligible for all gas equipment improvements.

**All residential electric and natural gas, individually metered condo units are eligible** to apply for HEAT Loan financing for eligible measures. Condos that are master metered in condo complexes are NOT eligible to participate in the HEAT Loan Program.

**No warranties:** THE PROGRAM SPONSORS DO NOT GUARANTEE THE PERFORMANCE OF ANY INSTALLED EQUIPMENT. THE PROGRAM SPONSORS EXPRESSLY DISCLAIM 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. THE PROGRAM SPONSORS DO NOT MAKE ANY REPRESENTATION OF ANY KIND REGARDING THE RESULTS TO BE ACHIEVED BY THE INSTALLATION OF ANY ENERGY EFFICIENCY IMPROVEMENT.

**Contractor selection:** The HEAT Loan Program requires that selected contractors are licensed and insured. It is your responsibility to verify the license and insurance coverage of your chosen contractor(s) before installing energy efficient improvements. If financing Heat Pumps, the contractor selected must be part of the Heat Pump Installer Network.

**Limitation of liability:** The Program Administrators’ liability is limited to the amount of the rebate and loan interest rate subsidy. The Sponsors are 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:** The Sponsors reserve the right to withhold payment of any rebate until the installed improvements have undergone a verification and inspection of the specified installation to ensure compliance with program requirements. All customers who successfully receive financing will need this verification inspection.

**Measures not installed or not meeting program requirements:** If the measures installed do not meet the program requirements or are not installed, the customer is only liable for the interest costs and the repayment to the Sponsors (via your HEAT Loan Administrator) 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. Preparing the lender does not satisfy the interest cost reimbursement for non-installed or ineligible measures. The customer must contact their HEAT Loan Administrator to work out repayment details.

**Utility energy benefit:** The Sponsors are 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 us with such further documentation as we may request to confirm the 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 will end on the last calendar day of the year.

**Please submit your signed HEAT Loan Intake Form and all required documents via the email address or website of your HEAT Loan Administrator (based on your location and Program Sponsor). Find yours below.**

Mass Save program sponsor	Territory	HEAT Loan administrator	Address	Email address or website	Phone
Cape Light Compact	Cape Cod & Martha's Vineyard	Rise Engineering	765 Attucks Lane, Hyannis, MA 02601	EELoanCape@RISEngineering.com	508-568-1926
Eversource (formerly Columbia Gas)	Municipal Electric Towns	Rise Engineering	1341 Elmwood Avenue, Cranston, RI 02910	EELoanMA@RISEngineering.com	339-502-6335
Liberty	Municipal Electric Towns	Rise Engineering	1341 Elmwood Avenue, Cranston, RI 02910	EELoanMA@RISEngineering.com	339-502-6335
Unitil Electric	All	Rise Engineering	1341 Elmwood Avenue, Cranston, RI 02910	EELoanMA@RISEngineering.com	339-502-6335
Eversource Electric	All except Cape Cod & Martha's Vineyard	CLEAResult	41 Brigham St. Unit 10 Marlborough, MA 01752	myHEATloan.com	800-696-8077
National Grid Electric	All except Cape Cod & Martha's Vineyard	CLEAResult	41 Brigham St. Unit 10 Marlborough, MA 01752	myHEATloan.com	800-696-8077
Municipal Electric with Eversource or National Grid Gas	All except Cape Cod & Martha's Vineyard	CLEAResult	41 Brigham St. Unit 10 Marlborough, MA 01752	myHEATloan.com	800-696-8077

**WE ARE MASS SAVE®:**