



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 applicant's 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
- Condensing boilers and furnaces
- Replacement windows
- Air source or ground source heat pumps
- Electric panel upgrade
- Insulation and pre-weatherization barriers
- In conjunction with heat pump and/or heat pump water heater installation
- Domestic water heating equipment
- Heat pump water heater

Section 2 (Existing conditions filled out by Energy Specialist)

Date of energy assessment (if applicable) _____

Energy Specialist & company _____

Units in building 1 2 3 4 _____

Condo Yes No Complex name _____

Site ID # _____

Electric account # _____

Gas account # (if applicable) _____

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

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 | <input type="checkbox"/> Heat Pumps | Fuel | <input type="checkbox"/> Natural gas |
| | <input type="checkbox"/> Condensing Furnace | | <input type="checkbox"/> Propane |
| | <input type="checkbox"/> Non-Condensing Furnace | | <input type="checkbox"/> Oil |
| | <input type="checkbox"/> Condensing Boiler | | <input type="checkbox"/> Electric |
| | <input type="checkbox"/> Non-Condensing Boiler | | <input type="checkbox"/> Other _____ |
| | <input type="checkbox"/> Steam Boiler | | |
| | <input type="checkbox"/> New Construction | | |
| | <input type="checkbox"/> Other _____ | | |

Existing domestic water heater

- | | | | |
|-------------|--|-------------|--------------------------------------|
| Type | <input type="checkbox"/> Freestanding tank | Fuel | <input type="checkbox"/> Natural gas |
| | <input type="checkbox"/> Tankless | | <input type="checkbox"/> Propane |
| | <input type="checkbox"/> Indirect tank | | <input type="checkbox"/> Oil |
| | <input type="checkbox"/> Other _____ | | <input type="checkbox"/> Electric |
| | | | <input type="checkbox"/> 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](https://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 Sponsor.

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 Mass Save are the following utilities and program administrators, and will henceforth in this document be referred to as "the Sponsors": Berkshire Gas, Cape Light Compact, Eversource, Liberty, National Grid and Unitil.

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. Under certain conditions, customers can take advantage of this loan program multiple times, and may be able to exceed the loan maximum of \$25,000. Contact your HEAT Loan Administrator for details.

Municipal electric customers that heat with natural gas provided by Eversource, National Grid and Liberty are eligible to participate in the HEAT Loan Program for all improvements.

All residential customers with sponsoring electric and natural gas, individually metered condo units are eligible to apply for HEAT Loan financing for eligible upgrades. Condominiums that are master metered in condo complexes are NOT eligible to participate in the HEAT Loan Program.

No warranties: The Sponsors do not warranty the performance of any installed equipment. The 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 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 efficiency improvements. If financing heat pumps or insulation, the contractor selected must be a program-participating contractor. Visit [MassSave.com/FindAContractor](https://masssave.com/FindAContractor). If financing residential storage batteries, visit [MassSave.com/connectedsolutions-batteries](https://masssave.com/connectedsolutions-batteries) for contractor details.

Limitation of liability: The Sponsors' 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.

Upgrades not installed or not meeting program requirements: If the upgrades 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 upgrade, which can be paid out of the balance of the job. Interest costs for HEAT loans are prepaid for the entire term by the program administrator once the loan is closed. Prepaying the lender does not satisfy the interest cost reimbursement for non-installed or ineligible upgrades. 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@RISEengineering.com	508-568-1926
Liberty	Municipal Electric Towns	Rise Engineering	1341 Elmwood Ave. Cranston, RI 02910	EELoanMA@RISEengineering.com	339-502-6335
Unitil Electric	All	Rise Engineering	1341 Elmwood Ave. Cranston, RI 02910	EELoanMA@RISEengineering.com	339-502-6335
Eversource Electric and/or Gas	All except Cape Cod & Martha's Vineyard	CLEAResult & Rise Engineering		masssave.com/HEATLoan	866-527-SAVE
National Grid Electric	All except Cape Cod & Martha's Vineyard	CLEAResult	112 Turnpike Road, Suite 111 Westborough, MA 01581	myHEATLoan.com	800-696-8077
Municipal Electric with National Grid Gas	All except Cape Cod & Martha's Vineyard	CLEAResult	112 Turnpike Road, Suite 111 Westborough, MA 01581	myHEATLoan.com	800-696-8077

WE ARE MASS SAVE®:

