

Electric Forklift and Tow Tractor Incentive Application for Business Customers

2022

A Cash Incentive Energy Efficiency Program brought to you by:



IMPORTANT INSTRUCTIONS:

Step 1: Determine Eligibility. See last page of application for detailed Terms and Conditions.

Step 2: Install Equipment. See last page of application for detailed Terms and Conditions.

Step 3: Complete and Submit Application. A completed application and all required supporting documents must be received by The Utility within 90 days of receiving equipment. Incomplete applications will cause delays in payment or denial of the application. **Post-inspection to verify equipment is required.**

Email the application and supporting documentation to: rebate@brightenergysolutions.com

OR

Mail or fax the application and all supporting documentation to:

Marshall Municipal Utilities
113 South 4th Street
Marshall MN 56258
Phone: (507) 537-7005
Fax: (507) 537-6836

Please note: Marshall Municipal Utilities and its supplemental power supplier, Missouri River Energy Services, are offering this Bright Energy Solutions Program. Marshall Municipal Utilities and Missouri River Energy Services together will be referred to as "The Utility" throughout this document.



Please visit www.brightenergysolutions.com for more information about the Bright Energy Solutions® Programs.

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HAS THIS PROJECT BEEN PREAPPROVED? YES NO

Customer Information (Please Print)

Company Name		Contact Name		Date Submitted
Installation Address	City	State	Zip Code	
Mailing Address	City	State	Zip Code	
Phone	Installation (Completion) Date			
Email Address*				

*(By providing your email address, you are granting The Utility permission to send emails regarding this project and/or updates on our incentive programs)

Municipal Utility Account Number

Building Use-Please Check One

Office
 Retail
 Convenience Store
 Warehouse
 Restaurant
 Lodging
 Manufacturing

School: Elementary
 Secondary/High School
 College
 Healthcare: Clinic
 Hospital

Other/Miscellaneous: _____

Facility Hours of Operation			
Hours per day	Days per Week	Weeks per Year	Hours per Year (hours x days x weeks)

Vendor/Contractor Information

Company Name		Contact Name		Phone	
Address	City	State	Zip Code		
Email Address*					

*(By providing your email address, you are granting The Utility permission to send emails regarding this project and/or updates on our incentive programs)

Payment Information

Please process payment to: Customer (listed above)
 Vendor or Contractor (listed above)
 Alternative Recipient

If payment is to be made to an Alternative Recipient, please complete the remainder of this section:

Company Name		Contact Name		Phone	
Address	City	State	Zip Code		

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2022

Class 1 or Class 2 Electric Forklifts and Class 6 Tow Tractors

Incentive does not apply to units used in the refrigerated portions of refrigerated warehouses and food processing facilities, or in other areas where OSHA and FDA regulations make electric units standard practice.

Manufacturer	Model	Serial Number	Qty	Incentive Each	Total Incentive
				\$2,000	

Equipment Type: <input type="checkbox"/> Class 1 Forklift <input type="checkbox"/> Class 2 Forklift <input type="checkbox"/> Class 6 Tow Tractor	Number of Shifts Used: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
Ownership type: <input type="checkbox"/> Purchase <input type="checkbox"/> Lease If Lease ____ years (3-yr Min)	<input type="checkbox"/> Replacing Internal Combustion Forklift or Tow Truck
Equipment Condition: <input type="checkbox"/> New Equipment <input type="checkbox"/> Demo or Remanufactured*	<input type="checkbox"/> Not replacing—Addition to Fleet <input type="checkbox"/> Replacing Electric (Not eligible for rebate)

Class 1 or Class 2 Electric Forklifts and Class 6 Tow Tractors

Manufacturer	Model	Serial Number	Qty	Incentive Each	Total Incentive
				\$2,000	

Equipment Type: <input type="checkbox"/> Class 1 Forklift <input type="checkbox"/> Class 2 Forklift <input type="checkbox"/> Class 6 Tow Tractor	Number of Shifts Used: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
Ownership type: <input type="checkbox"/> Purchase <input type="checkbox"/> Lease If Lease ____ years (3-yr Min)	<input type="checkbox"/> Replacing Internal Combustion Forklift or Tow Truck
Equipment Condition: <input type="checkbox"/> New Equipment <input type="checkbox"/> Demo or Remanufactured*	<input type="checkbox"/> Not replacing—Addition to Fleet <input type="checkbox"/> Replacing Electric (Not eligible for rebate)

Class 1 or Class 2 Electric Forklifts and Class 6 Tow Tractors

Manufacturer	Model	Serial Number	Qty	Incentive Each	Total Incentive
				\$2,000	

Equipment Type: <input type="checkbox"/> Class 1 Forklift <input type="checkbox"/> Class 2 Forklift <input type="checkbox"/> Class 6 Tow Tractor	Number of Shifts Used: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
Ownership type: <input type="checkbox"/> Purchase <input type="checkbox"/> Lease If Lease ____ years (3-yr Min)	<input type="checkbox"/> Replacing Internal Combustion Forklift or Tow Truck
Equipment Condition: <input type="checkbox"/> New Equipment <input type="checkbox"/> Demo or Remanufactured*	<input type="checkbox"/> Not replacing—Addition to Fleet <input type="checkbox"/> Replacing Electric (Not eligible for rebate)

*Demo or remanufactured units must be under 5 years old and carry the same warranty as a new unit.

Total Number of Forklifts at this facility prior to this project (not including hand trucks/pallet jacks, also referred to as Class 3):

Propane: _____ Diesel _____ Electric: _____

Total Number of Class 6 Tow Tractors at this facility prior to this project:

Propane: _____ Diesel _____ Electric: _____

Summary of Incentives

Class 1 or Class 2 Electric Forklifts or Class 6 Electric Tow Tractors	\$
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2022

PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:

- 1) Spec sheet or literature clearly showing forklift type.
- 2) Invoice showing make, model year, model number, serial number, cost, purchase or lease date, and lease term (if applicable.)

TERMS:

- Only electric forklifts and tow tractors purchased or leased before December 31 of the year indicated on this application, as identified by the sales contract attached to the application, are eligible. **Post-inspection is required to verify equipment.**
- The incentive is available for the purchase or lease of a new Class 1 (counterbalance), Class 2 (narrow aisle) Electric Forklift or Class 6 Electric Tow Tractors. Dealer demo or remanufactured units less than 5 years old with the same written warranty as new are also be eligible. If leased, the lease term must be for a minimum of three years.
- Forklift or Tow Tractor must be a new addition to the fleet or replacing an existing internal combustion forklift. No rebate is offered for units replacing existing electric forklifts.
- Customer must be an industrial or commercial Utility customer who is in good standing, and the electric forklifts and/or tow tractors under this incentive application must be operated for a minimum of three years at a commercial address with an active meter receiving electric service from the Utility.
- Customer agrees to maintain the electric forklift and/or tow tractor and to promptly repair as needed during the first three years of operation.

Certifications and Signature

I hereby certify that: 1. **The forklifts and/or tow tractors for which an incentive is being applied are either new additions to the fleet or are replacing internal combustion forklifts. The units are not replacing existing electric units;** 2. The information contained in this application is accurate and complete; 3. All installation is complete and the unit(s) is operational prior to submitting application; 4. All rules of this incentive program have been followed; and, 5. I have read and understand the terms and conditions applicable to this incentive program as set forth in this application, including those set forth on the last page of this application form.

The customer agrees to verification of equipment installation which may include a site inspection by a program or utility representative. The customer understands that it is not allowed to receive more than one incentive from this program on any piece of equipment. The customer agrees to indemnify, defend, hold harmless and release The Utility from any claims, damages, liabilities, costs and expenses (including reasonable attorneys' fees) arising from or relating to the removal, disposal, installation or operation of any equipment or related materials in connection with the programs described in this application, including any incidental, special or consequential damages.

I CERTIFY THAT THE FORKLIFTS AND/OR TOW TRACTORS FOR WHICH I HAVE APPLIED FOR AN INCENTIVE ARE NOT REPLACING EXISTING ELECTRIC FORKLIFTS OR TOW TRACTORS:

Customer Signature	Print Name	
	Title (if applicable)	Date

Member Utility Use Only		Date Received:	
Pre-Inspected?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Date Pre-Inspected:	Initials:
Post-Inspected?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Date Post-Inspected:	Initials:
Incentive Approved?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Amount \$	Date Approved:
Utility or Program Representative			

Commercial BES Application Checklist

Before submitting this application please complete and include all items listed below:

- ✓ **Complete Application**
 - Customer Information Section
 - Vendor/Contractor Information Section
 - Rebate sections Completed
 - Customer Signature (above)
- ✓ **Attach a Copy of the Equipment Invoice**
 - Equipment Quantities
 - Model numbers of equipment installed
- ✓ **Specification Sheets**

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2022

ELIGIBILITY:

- These incentives are offered by Missouri River Energy Services and its participating members. For questions regarding eligibility, call your local utility listed on the cover page of this application.
- Commercial, industrial, and governmental customers who purchase electricity from The Utility are eligible to participate in the Bright Energy Solutions® Electric Forklift and Tow Tractor Incentive Program. Eligible equipment must be connected to an electric service billed under a commercial or industrial rate class by The Utility. Excludes equipment for residential spaces such as apartments.
- Customers that self-generate more than 5% of their annual energy needs are not eligible for BES rebates. The Bright Energy Choices green energy program can help customers achieve net-zero carbon or 100% renewable power supply without self-generation. Contact your utility for more information.
- This program is applicable only to equipment that meets the detailed equipment specifications and requirements described in this application. The Utility will determine, in its discretion, whether such specifications and requirements are satisfied.
- Customers may not receive more than one incentive for each piece of equipment installed under this program or any combination of Bright Energy Solutions programs.

TERMS AND CONDITIONS:

1. **Incentive Offer:** Installation must be completed by December 31 of the year indicated on this application. A signed application and itemized invoices for materials and labor must be submitted to the participating utility at the address located on the cover page of this application **within 90 calendar days of project completion**. Please keep a copy for your records.
2. **Proof of Purchase:** This application must have complete information and be submitted with an invoice(s) itemizing the new equipment purchased or leased. Lease term must be included if applicable. The invoice(s) must indicate date of purchase (or lease), make, model, model year, serial number and cost.
3. **Compliance:**
 - a) All projects must comply with federal, state, and local codes.
 - b) All equipment must be new. Dealer demo or remanufactured units with the same written warranty as new may also be eligible with utility pre-approval.
 - c) Equipment must meet specification requirements and be purchased, installed and operating prior to submitting an incentive application.
 - d) Equipment must not be used to qualify and receive payment for energy savings from any wholesale electricity market.
 - e) Customers may only receive one incentive per piece of qualifying equipment.
 - f) **All projects for which more than \$20,000 in incentive payments is sought must be approved by The Utility prior to the commencement of the project.** Receipt of pre-approval does not guarantee incentive payments will be made. Incentive payments will be made only upon the customer's satisfaction of all terms and conditions of this program.
 - g) All terms and conditions of this application must be satisfied by the customer.
4. **Payment:** Once completed paperwork is submitted, incentive payments are usually made within 4-8 weeks. Incomplete applications will either delay payments or be denied. The Utility reserves the right to refuse payment and participation if the customer or the customer's contractor violates program rules and procedures.
5. **Inspection:** The Utility may conduct an inspection of the customer's facility to survey any installed projects. All projects exceeding \$10,000 of incentives will be inspected prior to incentive payment. The Utility may inspect customer records relating to incentives sought by the customer.
6. **Information Sharing:** The Utility reserves the right to publicize your participation in this program, unless you specifically request otherwise in writing. Information contained in this application may be shared with state boards, commissions, departments, and other Bright Energy Solutions participating utilities.
7. **Program Discretion:** Incentives are available on a first-come, first-served basis. This program and its incentive amounts are subject to change or termination without notice at the discretion of The Utility. Neither pre-approval of a project, nor any other action by The Utility, will entitle a customer to an incentive payment until the application is finally approved by The Utility. The Utility reserves the right to load manage (cycle on or off) customer equipment that qualifies for incentives under this program.
8. **Logo Use:** Customers or trade allies may not use the name or logo of Bright Energy Solutions, The Utility, or any other participating utility in any marketing, advertising, or promotional material without written permission.
9. **Disclaimers:** The Utility
 - a) does not endorse any particular manufacturer, product, labor or system design by offering these programs;
 - b) will not be responsible for any tax liability imposed on the customer as a result of the payment of incentives;
 - c) does not expressly or implicitly warrant the installation or performance of installed equipment or any contractor's quality of work (contact the equipment manufacturer or contractor for warranties);
 - d) is not responsible for the proper disposal/recycling of any waste generated as a result of this project;
 - e) is not liable for any damage, injury, or loss of life arising from or relating to the removal, installation, or operation of any equipment, or any other action taken by the customer or The Utility, in connection with a project undertaken by the customer under the programs described in this application;

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2022

INCENTIVE LIMIT:

- **Eligible customers may purchase and install qualifying equipment and receive an energy efficiency incentive of up to \$100,000 per customer, per calendar year.** Payments for larger incentives may be allowed at the discretion of The Utility.
- Total incentive will not exceed 75 percent of the project cost, including installation. If self-installed, incentives for items of equipment can be up to the purchase price of a specific item, but shall not exceed the Bright Energy Solutions incentives set by Missouri River Energy Services.
- Incentives for particular items of equipment and/or systems are limited as set forth in this application.