

Forklift Lithium Battery, Electric Forklift, and Tow Tractor Incentive Application for Business Customers

2025

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.

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.

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

OR

Mail the application and all supporting documentation to:

Rock Rapids Municipal Utilities
310 S Third Ave
Rock Rapids, IA 51246

Phone: (712) 472-2511

Please note: Rock Rapids Municipal Utilities and its supplemental power supplier, Missouri River Energy Services, are offering this Bright Energy Solutions Program. Rock Rapids 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® Program.

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2025HAS 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 Date			
Email Address*				

*By providing your email address, you are granting The Utility permission to send emails regarding this project and/or updates on the incentive program.

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 the incentive program.

Payment InformationProcess payment to: ☐ Customer (listed above) ☐ Vendor or Contractor (listed above) ☐ Alternate Recipient**If payment is to be made to an Alternate Recipient, please complete the remainder of this section:**

Company Name	Contact Name	Phone	
Address	City	State	Zip Code

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2025

A. Class 1 or Class 2 Electric Forklifts or Class 6 Tow Tractors

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

Units Operating 3 Shifts

Manufacturer	Model	Serial Number	Incentive Each	Total Incentive
			\$2,000	
			\$2000	
			\$2000	

Equipment Type: ☐ Class 1 Forklift ☐ Class 2 Forklift ☐ Class 6 Tow Tractor

☐ Replacing Internal Combustion Forklift or Tow Truck

Ownership type: ☐ Purchase ☐ Lease If Lease ____ years (3-yr min)

☐ Not replacing—Addition to Fleet

Equipment Condition: ☐ New Equipment ☐ Demo or Remanufactured*

☐ Replacing Electric (not eligible for rebate)

Units Operating 2 Shifts

Manufacturer	Model	Serial Number	Incentive Each	Total Incentive
			\$1500	
			\$1500	
			\$1500	

Equipment Type: ☐ Class 1 Forklift ☐ Class 2 Forklift ☐ Class 6 Tow Tractor

☐ Replacing Internal Combustion Forklift or Tow Truck

Ownership type: ☐ Purchase ☐ Lease If Lease ____ years (3-yr min)

☐ Not replacing—Addition to Fleet

Equipment Condition: ☐ New Equipment ☐ Demo or Remanufactured*

☐ Replacing Electric (not eligible for rebate)

Units Operating 1 Shift

Manufacturer	Model	Serial Number	Incentive Each	Total Incentive
			\$1000	
			\$1000	
			\$1000	

Equipment Type: ☐ Class 1 Forklift ☐ Class 2 Forklift ☐ Class 6 Tow Tractor

☐ Replacing Internal Combustion Forklift or Tow Truck

Ownership type: ☐ Purchase ☐ Lease If Lease ____ years (3-yr min)

☐ Not replacing—Addition to Fleet

Equipment Condition: ☐ New Equipment ☐ Demo or Remanufactured*

☐ Replacing Electric (not eligible for rebate)

Subtotal Section A:

\$

*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: _____

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2025

B. Lithium Battery for Electric Forklifts and Tow Tractors (minimum 24 hour operation required)						
Manufacturer	Model	Serial Number(s)	Qty	Shifts Operated (minimum of 3 to qualify for incentive)	Incentive Per Forklift	Total Incentive
				<input type="checkbox"/> 3 (24/hrs/day—5 days/week) <input type="checkbox"/> 4 (24 hrs/day—7 days/week)	\$750	
				<input type="checkbox"/> 3 (24/hrs/day—5 days/week) <input type="checkbox"/> 4 (24 hrs/day—7 days/week)	\$750	
				<input type="checkbox"/> 3 (24/hrs/day—5 days/week) <input type="checkbox"/> 4 (24 hrs/day—7 days/week)	\$750	
				<input type="checkbox"/> 3 (24/hrs/day—5 days/week) <input type="checkbox"/> 4 (24 hrs/day—7 days/week)	\$750	
				<input type="checkbox"/> 3 (24/hrs/day—5 days/week) <input type="checkbox"/> 4 (24 hrs/day—7 days/week)	\$750	

Total number of forklifts at this facility 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:

Propane: _____ Diesel: _____ Electric: _____

Subtotal Section B:	\$
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Summary of Incentives	
Subtotal Section A: Class 1 or Class 2 Electric Forklifts or Class 6 Electric Tow Tractors	\$
Subtotal Section B: Lithium Battery Charger	\$
Total Incentive	\$

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2025

PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:

- Spec sheet or literature clearly showing forklift or battery type.
- 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.
- 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 Tractor. Dealer demo or remanufactured units less than 5 years old, with the same written warranty as new, are 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 information contained in this application is accurate and complete;
2. All installation is complete and the unit(s) is operational prior to submitting application;
3. All rules of this incentive program have been followed;
4. 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.

Please sign and complete all information below.

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

Date

Commercial BES Application Checklist

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

- ✓ **Complete application**
 - ☐ Customer information
 - ☐ Vendor/Contractor information
 - ☐ Equipment information
 - ☐ Customer signature
- ✓ **Attach a Copy of the Invoice**
 - ☐ Equipment quantities
 - ☐ Model numbers of equipment installed
- ✓ **Specification sheets**

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:			

Terms and Conditions for Bright Energy Solutions Business Incentives

ELIGIBILITY:

- Bright Energy Solutions 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 this Bright Energy Solutions® 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 may not receive more than one incentive for each piece of equipment installed under any combination of Bright Energy Solutions programs.

TERMS AND CONDITIONS:

1. **Incentive Offer:** Projects, including all required installation, must be completed by December 31 of the year indicated on this application form. A signed application and itemized invoices for materials and labor must be submitted to The Utility **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 invoices itemizing the new equipment purchased and labor costs. Invoices must indicate date of purchase, make, model and total project cost. OEM specification sheets or DLC documents must also be provided where applicable and available.
3. **Compliance:**
 - a) All projects must comply with federal, state, and local code, licensing, and permit requirements.
 - b) All equipment must be new or retrofitted with new components per the program specifications. Used or rebuilt equipment is not eligible for incentives. Existing equipment must be removed and properly disposed of.
 - 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) **All projects for which more than \$20,000 in incentive payments is sought must be approved by The Utility in writing prior to the commencement of the project.** Receipt of pre-approval does not guarantee incentive payments will be made. All terms and conditions of this application must be satisfied by the customer.
4. **Payment:** Once completed paperwork is submitted, incentive payments are made within 4-8 weeks. Incomplete applications will delay payments. The Utility reserves the right to refuse payment and participation for violations of program rules and procedures.
5. **Inspection:** The Utility may conduct an inspection of any installed projects. All projects exceeding \$10,000 of incentives will be inspected prior to incentive payment.
6. **Information Sharing:** The Utility reserves the right to publicize your participation in this program, unless you 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:** This program is 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;
 - 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 under the programs described in this application;
 - f) does not guarantee that a specific level of energy or cost savings will result from the implementation of energy efficiency measures or the use of products funded under this program.

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 can be up to the equipment purchase price, but shall not exceed the Bright Energy Solutions incentives set by Missouri River Energy Services.