

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

A Cash Incentive Energy Efficiency Program brought to you by:



Steps to Complete Your Application

Step 1: Determine eligibility: Pre-approval is required if the potential incentive is greater than \$20,000 prior to project start. Contact The Utility for pre-approval. Equipment must be **new** and installed in a **commercial or industrial facility** (excluding residential spaces) served by a participating utility. Used or rebuilt equipment is **not** eligible. The incentive may not exceed **75% of total project cost**, or **100% of material cost** if the project is self-installed.

Step 2: Install equipment. New equipment must be installed and operational **before** you submit this application. Replaced equipment must be removed and properly disposed of.

Step 3: Complete and sign the application. Include copies of **all project invoices** (labor and materials) and supporting documents such as specification sheets.

Step 4: Submit completed application. The completed application and all supporting documents must be received within 180 days of installation. 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.

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HAS THIS PROJECT PREAPPROVED? ☐ Yes ☐ No

Customer Information

Company Name	Contact Name	Date Submitted	
Installation Address	City	State	ZIP Code
Mailing Address	City	State	ZIP Code
Phone	Utility Account Number		Installation Date
Email Address			

Building Use – Please Check One:

- ☐ Office
 ☐ Retail
 ☐ 24-hour Facility
 ☐ Warehouse
 ☐ Restaurant
 ☐ Lodging
 ☐ Grocery/Supermarket
 ☐ Manufacturing
- School: ☐ Elementary/Secondary ☐ College
 Healthcare: ☐ Clinic ☐ Hospital
- ☐ Other/Miscellaneous: _____

Facility Hours of Operation: Hours per Year (hours x days x weeks) _____

Vendor/Contractor Information

Company Name	Contact Name	Phone	
Address	City	State	ZIP Code
Email Address			

Payment Information

Please process payment to:	<input type="checkbox"/> Customer (listed above)	<input type="checkbox"/> Vendor/Contractor (listed above)	<input type="checkbox"/> Alternative Recipient
<i>If payment is to be made to an Alternative Recipient, please complete the remainder of this section:</i>			
Company Name	Contact Name	Phone	
Address	City	State	ZIP Code

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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	Total
			\$2,000	
			\$2,000	
			\$2,000	
Equipment Type:	<input type="checkbox"/> Class 1 Forklift	<input type="checkbox"/> Class 2 Forklift	<input type="checkbox"/> Class 6 Tow Tractor	<input type="checkbox"/> Replacing Internal Combustion Forklift or Tow Truck
Ownership Type:	<input type="checkbox"/> Purchased	<input type="checkbox"/> Leased _____ years (3 year minimum)		<input type="checkbox"/> Not replacing/addition to fleet
Equipment Condition:	<input type="checkbox"/> New	<input type="checkbox"/> Demo or Remanufactured*		<input type="checkbox"/> Replacing Electric (not eligible for a rebate)

Units Operating 2 Shifts

Manufacturer	Model	Serial Number	Incentive	Total
			\$1,500	
			\$1,500	
			\$1,500	
Equipment Type:	<input type="checkbox"/> Class 1 Forklift	<input type="checkbox"/> Class 2 Forklift	<input type="checkbox"/> Class 6 Tow Tractor	<input type="checkbox"/> Replacing Internal Combustion Forklift or Tow Truck
Ownership Type:	<input type="checkbox"/> Purchased	<input type="checkbox"/> Leased _____ years (3 year minimum)		<input type="checkbox"/> Not replacing/addition to fleet
Equipment Condition:	<input type="checkbox"/> New	<input type="checkbox"/> Demo or Remanufactured*		<input type="checkbox"/> Replacing Electric (not eligible for a rebate)

Units Operating 1 Shift

Manufacturer	Model	Serial Number	Incentive	Total
			\$1,000	
			\$1,000	
			\$1,000	
Equipment Type:	<input type="checkbox"/> Class 1 Forklift	<input type="checkbox"/> Class 2 Forklift	<input type="checkbox"/> Class 6 Tow Tractor	<input type="checkbox"/> Replacing Internal Combustion Forklift or Tow Truck
Ownership Type:	<input type="checkbox"/> Purchased	<input type="checkbox"/> Leased _____ years (3 year minimum)		<input type="checkbox"/> Not replacing/addition to fleet
Equipment Condition:	<input type="checkbox"/> New	<input type="checkbox"/> Demo or Remanufactured*		<input type="checkbox"/> Replacing Electric (not eligible for a rebate)

Section A \$

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

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B. Lithium Batteries for Class 1 or 2 Electric Forklifts and or Class 6 Tow Tractors (minimum 24-hour operation required)

Manufacturer	Model	Serial Number(s)	Quantity	Shifts operated (minimum of 3 shifts to qualify)	Incentive	Total
				<input type="checkbox"/> 3(24hrs/day x 5 days/week) <input type="checkbox"/> 4(24hrs/day x 7 days/week)	\$750	
				<input type="checkbox"/> 3(24hrs/day x 5 days/week) <input type="checkbox"/> 4(24hrs/day x 7 days/week)	\$750	
				<input type="checkbox"/> 3(24hrs/day x 5 days/week) <input type="checkbox"/> 4(24hrs/day x 7 days/week)	\$750	
				<input type="checkbox"/> 3(24hrs/day x 5 days/week) <input type="checkbox"/> 4(24hrs/day x 7 days/week)	\$750	
				<input type="checkbox"/> 3(24hrs/day x 5 days/week) <input type="checkbox"/> 4(24hrs/day x 7 days/week)	\$750	
				<input type="checkbox"/> 3(24hrs/day x 5 days/week) <input type="checkbox"/> 4(24hrs/day x 7 days/week)	\$750	
					Section B	\$

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

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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 the 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 Equipment Invoice
 - ☐ Equipment Quantity
 - ☐ Model numbers of equipment installed
- ✓ Specification sheets

Member Utility Use Only

Date Received:

Date pre-inspected:

Initials:

Date post-inspected:

Initials:

Incentive Approved: ☐ Yes ☐ No

Amount: \$

Date Approved:

Utility or Program Representative:

Terms and Conditions for Bright Energy Solutions® Incentive Program

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.
- This program is applicable only to equipment that meets the detailed 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 any combination of Bright Energy Solutions programs. Equipment installed as a backup or redundant system is not eligible.

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 unless Conditional Preapproval has been issued by The Utility.
2. Compliance:
 - a) All projects must comply with federal, state, and local code, licensing, and permit requirements.
 - b) Equipment must not be used to qualify and receive payment for energy savings from any wholesale electricity market.
 - c) **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.
 - d) All terms and conditions of this application must be satisfied by the customer.
3. Payment: Incentive payments are usually made within 4 – 8 weeks. The Utility reserves the right to refuse payment and participation for violations of program rules and procedures.
4. Inspection: The Utility may conduct an inspection of any installed projects.
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.
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 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:

Energy efficiency incentives are available to eligible customers for the purchase and installation of qualifying equipment, subject to the following limits per calendar year:

- **Commercial and industrial customers:** up to \$100,000 per customer per calendar year.
- **Residential customers:** up to \$10,000 per customer per calendar year.