

Jerry Lotz - CostSeg Energy Solutions



Jerry Lotz is Senior Savings Advisor at CostSeg Energy Solutions. CostSeg Energy Solutions represents a few “Best-in-Class” companies whose mission is to help commercial property owners, leaseholders, for profit and not-for-profit organizations, as well as consumers, to save money. Additionally, we champion programs that enhance the lives of subscribers. Here is a breakdown of the initiatives:

Tax Savings:

- Engineering-based Cost Segregation Studies (40,000 + projects nationwide)
- Tangible Property Regulations compliance
- Repair Reg and QIP calculations
- CAP - EX Reversal analysis
- 179D Tax Savings calculations
- R&D Tax Credit calculations
- Commercial Property Tax dispute
- Employee Workforce Tax incentives
- “Captive Insurance Company” – Tax Saving initiative (831b)

Energy Savings:

- Commercial HVAC and PTAC retrofit devices – (10% - 30% saving)
- Commercial Refrigeration retrofit devices – (10% - 30% savings)
- Commercial UVA-LED HVAC disinfecting technology
- Commercial Engineering-Grade Energy audits
- Commercial Turn-key LED installations and SOLAR installations
- Commercial Electricity/Gas pricing Review-Refund-Reprice-Procure
- Residential HVAC retrofit device – ECOSTELLA (10% - 30% saving)
- Residential/Consumer electricity supply procurement and monitoring
- Community Solar – MD, NJ, ME, IL NY sm. bus. and consumer (10-25% savings)

Cost Reduction:

- Various Energy Efficiency initiatives (previous page)
- Commercial Expenditures (Review, Refund, Reprice-Procure)
- **Price Negotiate Recurring Monthly Expenses:** (*Commercial and Residential*)
[cell phone service, internet/cable service, security system charges, waste pick-up, storage facility, satellite, pest control, office equipment leases, web services, lawn care, propane, oxygen/gas services, electricity, marketing/advertising expenses, uniform rental, water cooler service, magazine subscriptions, etc....]
*** *The intent is NOT to change service providers, but negotiate better pricing with the current provider*
*** *There is NO charge if we don't find savings*

Additional Savings and Life Enhancing Initiatives:

- “The Plan” - Use with existing coverage or Stand-Alone Group Health
- “The Plan” saves employer money and puts more money into employees’ pocket
- Group Health Plan Insurance
- NEW EAP Services - MySpeedyX – Extended AUTO Warranty
- Emergency Notification Service - OnCall/MyNotify
- Custom Life Insurance and benefit programs
- Captive Insurance (Protect against risks, save taxes, build wealth)
- Virtually ELIMINATE INCOME TAXES for those earning \$300K+/year
- Reduce Student Loan Debt and Build Wealth
- ERTC - Employee Retention TAX CREDITS