



2024 Check Authorization Form

Payee Information (Person Receiving Check)

Payee Tax Status:

- ☐ Government ☐ Corporation ☐ Partnership ☐ Individual/Sole Proprietor
☐ Exempt (Tax exempt, non-profit) ☐ LLC

Payee Tax ID Number:

(Please indicate if this is: ☐ EIN ☐ Federal Tax ID ☐ SSN)

Check will be printed and payable as stated on the W9 form

Payee Business Name/Individual as it appears on your W9 form

Phone Number

Payee Contact Name

Payee Email Address

Mailing Address for Rebate Check if other than stated on the W9 form

Unit/Suite Number

Attention to:

City

State

ZIP

IRS Tax Reporting: SoCalGas will report this payment made to the check recipient on IRS form 1099 as "Other Income" unless the payment is less than \$600, or the payee is identified as a corporation or exempt. SoCalGas is not responsible for any taxes that may be imposed as a result of this incentive/rebate.

TERMS AND CONDITIONS

1. I certify that I am an eligible Southern California Gas Company (SoCalGas) customer and I have installed the indicated energy-saving products in 2024 for use in my business facility and not for resale or otherwise. Additionally, the product was installed within one year of the purchase date. I have attached documents establishing paid proof of purchase for the items applied for on this rebate form. I understand that incomplete and incorrect applications will not be processed.

2. I will allow, if requested, a representative from SoCalGas, the California Public Utilities Commission (CPUC), or any authorized third party reasonable access to my property to verify the installed product before a rebate is paid. I understand that a rebate will not be paid if I refuse to participate in any required verification. I understand that SoCalGas may contact the qualifying product vendor and/or installer to verify purchase and/or installation and may provide my name and/or address to complete this verification.

3. I understand that this project may be selected for evaluation studies and/or program measurement by external contractors appointed by the CPUC. These studies are used to analyze and improve program performance. I agree to participate by responding to inquiries from these external contractors.

4. I certify that the information on this rebate form is true and correct, and that the tax ID provided is accurate. I understand that rebate payments are based on related energy benefits over the life of the product. I agree to:

Maintain the energy efficient measure specified in the rebate form 100% functional for the life of the product or a period of five years from receipt of rebate funds, whichever is less, and

Continue to be a customer of SoCalGas during said time period.

5. **If the above ceases to be the case, I shall refund a prorated amount of rebate dollars to SoCalGas based on the actual period of time for which I provided the related energy benefits as a customer of SoCalGas. I understand that this program, or individual measures, may be modified or terminated without prior notice.**

6. I understand that this rebate application and the paid itemized invoice must be received at SoCalGas' Central Processing Center or postmarked no later than January 31, 2025. I acknowledge that I would not have undertaken an energy-efficiency equipment upgrade at this time if SoCalGas had not offered a monetary rebate.

7. In the event that I choose to participate in the On-Bill Financing Program (OBF) offered by SoCalGas to obtain financing for the products listed on this form, I understand that the OBF terms and conditions will control (including, without limitation, the rebate amount for the products listed here) if there is any conflict between the EERB terms and conditions and OBF.

8. **In no case will SoCalGas pay more than 100 percent of the actual purchase price of the items to be rebated or the maximum allowance per unit. Purchase price includes materials cost plus installation labor for pipe insulation, fitting insulation, tank insulation, greenhouse heat curtains, greenhouse infrared film and steam traps. Labor charges apply to vendors only. Customers who self-install may not charge installation labor. Sales taxes are not included in the item's purchase prices.**

9. This program has a limited budget. Rebate applications will be accepted on a first-come, first-served basis, until allocated funds are no longer available.

10. I have followed applicable permitting requirements for this installation. I have used a licensed contractor to install any space-heating boilers and any other equipment.

11. I have not received rebates, incentives or services for the same equipment from other utilities, states or local programs funded by the Public Purpose Program Surcharge (PPPS). However, I understand that water utilities are not funded by the PPPS and I may apply for their rebates.

12. I understand rebates are taxable, if greater than \$600 for business customers, and will be reported to the IRS on Form 1099 unless I have identified myself as a corporation or exempt. I am urged to consult my tax advisor concerning the taxability of rebates. SoCalGas is not responsible for any taxes that may be imposed on me or my business as a result of receipt of this rebate.

13. The selection, purchase and ownership of equipment are the sole responsibility of the customer. SoCalGas makes no representation as to the safety, reliability and/or efficiency of the equipment. **SoCalGas makes no warranty, whether expressed or implied, including warranty of merchantability or fitness for any particular purpose, use or application of any product installed in connection herewith.** I waive any and all claims against SoCalGas and its affiliate companies arising out of activities conducted on behalf of SoCalGas in connection with my application for any rebate(s) under this program. None of such parties shall be liable for any type of damages, whether direct or indirect, regardless of the form of action.
- I am authorizing the rebate check to go to the third party named in the online application and thus will not be receiving a rebate check. I also understand that my release of the payment to another party does not exempt me from program requirements. Furthermore, I concur that I must meet all eligibility criteria in order to be paid under this program.
- Customer Signature

Contractor Name

Date
- DISCLAIMER
- The Energy Efficiency Rebates for Business Program is funded by California utility customers and administered by Southern California Gas Company (SoCalGas) under the auspices of the California Public Utilities Commission. Program funds, including any funds utilized for rebates or incentives, will be allocated on a first-come, first-served basis until such funds are no longer available. This program may be modified or terminated without prior notice. The selection, purchase and ownership of goods and/or services are the sole responsibility of the customer. Customers who choose to participate in this program are not obligated to purchase any additional goods or services offered by manufacturer, vendor, service provider, or any other third party. **SoCalGas makes no warranty, whether expressed or implied, including warranty of merchantability or fitness for any particular purpose, use or application of selected goods and/or services selected by customer. SoCalGas does not endorse, qualify, or guarantee the work of any third party.** Eligibility requirements apply; see the program conditions for details.
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