RESIDENTIAL ENERGY EFFICIENCY LOAN ASSISTANCE PROGRAM
California Alternative Energy and Advanced Transportation Financing Authority

915 Capitol Mall
Sacramento, CA 95814
Telephone (916) 651-8157
Fax (916) 589-2855
CHEEF@treasurer.ca.gov

Borrower Form (Part 1 of 2)

PROJECT CERTIFICATIONS

Please fill this form out after project installation is complete

Pursuant to Section 10091.8 of the Program regulations, I certify that:

1. The Eligible Improvements have been completed to my satisfaction.
2. I understand that the California Alternative Energy and Advanced Transportation Financing Authority ("Authority") and its directors, officers, and agents do not guarantee the performance, quality, or workmanship of the Eligible Improvements.
3. I authorize the Qualified Contractor and the Participating Financial Institution or Participating Finance Lender to share information with the Authority, except as required by the Program regulations, including contact information, data on work performed and Eligible Improvements installed, information regarding the Eligible Loan, and other information relating to or arising from participation in the Program.
4. The Eligible Loan proceeds were used to pay for the Eligible Improvements.
5. All permits and approvals required to install the Eligible Improvements have been secured.
6. The Qualified Contractor provided me with a Bill Impact Estimate.
7. The information submitted by the contractor on the Certificate of Completion regarding rebates and/or incentives provided is accurate to the best of my knowledge.
8. I acknowledge and agree to allow CAEATFA, or its representatives, access to verify the installed measures. I understand that this inspection is for the purpose of determining that the installed measures meet all Program requirements.

How did you, the Borrower, become aware of the financing for this project?

☐ Contractor ☐ Lender ☒ Utility ☐ Energy Upgrade California ☐ Other: _____

I, the undersigned, hereby certify that all of the information provided in this application is true and accurate to the best of my knowledge.

Borrower's Signature: John B Doe

Printed Name: John B Doe **Date:** 2/19/2016

SAMPLE #2

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Borrower Form (Part 2 of 2)
Privacy Rights Disclosure

State and federal law protects the Borrower's right to privacy regarding information pertaining to you. As a result of your participation in an energy efficiency program, as approved by the California Public Utilities Commission and administered by the California Alternative Energy and Advanced Transportation Financing Authority ("CAEATFA"), CAEATFA may come into possession of some or all of the following information:

(1) Information disclosing the fact that you are a customer of the lender.
(2) The loan or account number associated with the loan.
(3) Name, address, social security number, and contact information.
(4) Financial status and underwriting criteria, including but not limited to credit scores.
(5) The amount of and terms for repayment of the loan.
(6) Information regarding your loan payment history.
(7) The equipment or improvements funded with the proceeds of the loan.
(8) Service agreement number on your utility bill, monthly energy use and utility account payment history.
(9) Usernames and passwords.

The information may be provided by your lender to CAEATFA or a contractor acting on its behalf. The information will be combined with energy usage information provided by your utility.

The information provided to CAEATFA may be released to the Investor Owned Utilities, other state agencies and the federal government pursuant to contracts, interagency agreements or if required by law. The information provided to CAEATFA will be released in an anonymized form aggregated with information from other loan recipients throughout the state to make both loan and energy efficiency project performance available to the public. The information released to the public will be anonymized and aggregated to reduce (but may not eliminate) the risk of anyone viewing the data making an association between specific information and the provider of that information. Information that cannot be anonymized and aggregated will not be released to the public.

The officials responsible for maintaining the information provided regarding your loan are program personnel at the agency or its contractors. You have the right of access to records established from the information provided to the agency as it pertains to you.

I, John B Doe, have read and acknowledge the privacy rights disclosure provided above.

Borrower's signature John B Doe

Print Name John B Doe **Date** 2/19/2016

Co-borrower's Signature _____

Print Name _____ **Date** _____

SAMPLE #2