

Client Information Form

This form is to be completed on behalf of client by a Verde Solutions Agent and can be completed by a client.

Today's Date:

Verde Solutions Agent Name

Email:

Phone:

Client Information:

Company Type:

Private Corp (LLC/S/C)

Non-Profit (tax exempt)

Public Corp

REIT

Partnership

Sole Proprietor

Client Company/Organization Name:

Client/Company/Organization Name:

Contact Information

Name	Title	Email	Phone	Decision Maker/Role	Present*
Main POC				Y <input type="checkbox"/> N <input type="checkbox"/> Role:	<input type="checkbox"/>
Facility POC**				Role:	<input type="checkbox"/>
Other POC**				Role:	<input type="checkbox"/>

*Select if will be present at site visit for facility audit

** Please name person who will be responsible for meeting a Verde Rep onsite to coordinate facility walkthrough if different from Main POC

Billing Address

Address	City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Installation Address

Address	City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Audit Schedule

An audit will not be scheduled usually any earlier than two weeks from submission of this form. Please select your preferred days, times, and time zone. A scheduler will be in contact with you to confirm the audit.

Preferred Days	<input type="checkbox"/> Mon	<input type="checkbox"/> Tue	<input type="checkbox"/> Wed	<input type="checkbox"/> Thu	<input type="checkbox"/> Fri
Confirm Time Zone	<input type="checkbox"/> EST	<input type="checkbox"/> CST	<input type="checkbox"/> MST	<input type="checkbox"/> PST	
Preferred Times	AM: <input type="checkbox"/> 7-9	<input type="checkbox"/> 9-11	<input type="checkbox"/> 11-1		
	PM: <input type="checkbox"/> 1-3	<input type="checkbox"/> 3-5	<input type="checkbox"/> 5-7		

Please provide any notes about the audit date/time preferences:

Scope of Opportunity and Facility Needs:

Square Footage of Facility/Area

Project/Facility Type

Facility Hours of Operation:

	From	To	24hs
Monday			<input type="checkbox"/>
Tuesday			<input type="checkbox"/>
Wednesday			<input type="checkbox"/>
Thursday			<input type="checkbox"/>
Friday			<input type="checkbox"/>
Saturday			<input type="checkbox"/>
Sunday			<input type="checkbox"/>

-Outdoor Lighting Weekly Hours of Operation*
*most are 10 hours a day/70 hour per week

-Can the main client contact authorize and execute the purchase order with Verde Solutions? Y N

If not briefly explain the decision making process for this project:

-Will this project need multiple quotations or go to RFP?

Y N

-Is this facility Owned Leased (check 1)

If leased when does the lease end?

-Are there any benchmarks or requirements that must be met to approve the proposal, if yes please explain (minimum payback periods, budget limits, installation schedule, etc.)?

Y N

-Is this project a full or partial LED lighting upgrade? If partial, please describe scope of lighting upgrade.

Full Partial

-Are there any specific issues or areas of concern in the current lighting plan?

Y N

-Are there any technical requirements for this project such as photometric analysis or foot-candle requirements, if yes please explain?

Y N

-What is the projected budget for this project?

Installation Services

- Does the client wish for Verde Solutions to manage the installation process? Y N

- Does the client require union labor? Y N

- Does the client have any specific insurance or bonding requirements for the installation contractor? *If yes please explain.*

Y N

- Is there a project deadline or completion date requested? *If yes please list date and provide any details.*

Y N

-Are there specific hours that the project must be installed? Y N
If yes please note (remember night and weekend installation could require additional labor fees)

-Year of construction or last major renovation?

Rebate Services

- Would the client like Verde Solutions to apply for utility incentives/rebates on their behalf if available? Y N

- Would the client prefer the rebates be paid to Verde as a discount of the upfront cost of project or paid to client directly after the project is completed?

Rebates to Verde (preference) Rebates paid to Client

Finance Services

-Is the client interested in financing options?
If yes, please provide a completed Verde Solutions Credit Application.

Y N

- What is the desired finance term length?

-When you have financed projects like this in the past what is your preferred method?

Additional Services

Is the client interested in Energy Efficiency Solutions beyond LED lighting? If so, please check the technologies of interest and offer a brief description of the scope of a desired project. *(note additional technologies may require supporting data from client. Verde Solutions internal teams will reach out for data requests as needed)*

HVAC Upgrades

Combined Heat and Power (CHP)

Variable Speed Motors

Solar Power

Building Automation

Energy Management Software

Energy Procurement Services

Additional Project Description

I authorize that the information provided is correct and I or another representative from the company is available to meet with a Verde Solutions representative for a full walkthrough of the property.

Signature _____ Date _____ Printed Name _____

- Copy of client's most recent Electric Bill (required) Copy of client's most recent Gas Bill (recommended) Competitor Estimates (if available)
 Pictures of indoor and outdoor fixtures (optional) Audit Worksheet (lighting count/optional) Simple Floor plans/drawings (if available)

Send completed forms to leads@verdesolutions.com or fax to **888.699.9036**