Prospect Information Form (PIF)

Agent Name:	Date:
E-mail:	Phone #:

Customer Information

Company/ Client:	Contact Name:
Email:	Phone #: Office:_____ Cell:_____
Billing Address:	
Installation Address:	
Company Name as it Appears on Tax Retruns:	Federal Tax ID # (FEIN):

Tax Status: ☐ Trust/Estate ☐ LLC ☐ Individual/Sole Proprietor

☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Non-Profit ☐ Public

Weekly Hours of Operation for Lights		**Project Description:** Provide short, summarizing statements on customer's current level of interest and project needs
Indoor	Outdoor	

Project Deadline: When does the product need to be on-site? When does the project need to be completed?	The electricity/gas utility bills are paid by the undersigned directly and not as part of rent/lease. _____ Customer Initials

Is the client interested in Energy Efficient Solutions beyond Lighting? If so, please "check" each additional Technology. ***(Note: Additional technologies may require supporting data from the client beyond their Utility Bill. Verde Solutions internal team will make data requests as needed)***

Controls & Sensors____ HVAC____ Variable Speed Motors____ Refrigerant____ BMS____ Solar____

AUDIT SCHEDULE (please include 3 dates and times for the audit)

1. Date:_____Time:_____ 2. Date:_____ Time:_____ 3. Date:_____ Time:_____

I authorize that I or another representative from the company is available to meet with a Verde Solutions representative for a full walkthrough at the times indicated above.

Signature: _____ Date: _____

Name: _____ Title: _____

For Internal Use ONLY: ATTACHMENTS

Copy of customer's complete electric bill (required) ☐ Pictures of indoor and outdoor fixtures (optional) ☐ Audit worksheet (lighting count - Optional) ☐

Send completed forms to: Leads@verdesolutions.com or fax to 888.699.9036