



# NEW YORK ENERGY STAR<sup>®</sup> FINANCING

# CREDIT APPLICATION

This is not a contract for a loan nor does it lock you into any commitment with a contractor. This is an application that will allow us to proceed with your request for a loan to finance your improvement(s). This will include reviewing your credit history.

Please complete all information requested. Incomplete applications will be returned to you for completion. You must include a copy of your contractor's estimate and, for loan requests above \$4,000, proof of income (recent paystub or if self-employed - provide copy of previous years federal tax return). Only new projects not yet started are eligible for financing. Upon completion of the application, please submit, along with your contractor's estimate and proof of income, (if necessary) to:

**Address: Energy Finance Solutions - 211 South Paterson Street 3rd Floor, Madison, WI 53703 or fax to: (608) 249-5788**  
**Apply online at: [www.energyfinesolutions.com](http://www.energyfinesolutions.com)**

## SECTION A - INDIVIDUAL APPLICANT INFORMATION

<i>Mr/Mrs/Ms</i>		<i>Last Name</i>		<i>First Name</i>		<i>MI</i>	<i>Jr/Sr/I/II</i>
<i>Birth Date</i>	<i>Home Phone</i>	<i>Social Security Number</i>	<i>Marital Status</i> (only for residents of: AZ, CA, ID, LA, NV, NM, TX, WA, WI) <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> UnMarried (single, divorced, widowed)				
<i>Installation Address (where home improvements are to be made)</i>			<i>Unit #</i>	<i>City</i>	<i>State</i>	<i>Zip</i>	
<i>Do You Currently</i> <input type="checkbox"/> Own <input type="checkbox"/> Rent	<i>Years at Current Address</i>	<i>Do or Will you own and reside at the above installation address?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No		<i>Dwelling Type (Multi (3 units +) does not qualify)</i> <input type="checkbox"/> Single Family <input type="checkbox"/> Duplex <input type="checkbox"/> Condo		<i>Mo. Mortgage Payment (including taxes)</i> \$	
<i>Current Address (if different than the above Installation Address)</i>				<i>City</i>	<i>State</i>	<i>Zip</i>	
<i>Mailing Address (if different than the above Current Address)</i>				<i>City</i>	<i>State</i>	<i>Zip</i>	
<i>Employer Name / Company</i>		<i>Employer's Address</i>		<i>City</i>	<i>State</i>	<i>Zip</i>	<i>How Long Employed?</i>
<i>Business Phone</i>	<i>Ext</i>	<i>Position or Title</i>	<i>Monthly Gross Salary</i> \$	<i>Circle One Below</i> FullTime PartTime Both		<i>Are you Self-Employed?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No	
<i>Employment Category Number (see 2nd page)</i>	<i>Employment Occupation Number (see 2nd page)</i>	<i>Sources of Other Income</i>				<i>Monthly Gross Salary</i> \$	
Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.							
Alimony, child support, separate maintenance received under: <input type="checkbox"/> Court Order <input type="checkbox"/> Written Agreement <input type="checkbox"/> Oral Understanding							

## SECTION B - JOINT APPLICANT

Complete only for joint credit (If Joint Applicant is a Co-Borrower/Spouse then they must own and occupy the home at the above installation address.)

<i>Mr/Mrs/Ms</i>		<i>Last Name</i>		<i>First Name</i>		<i>MI</i>	<i>Jr/Sr/I/II</i>
<i>Birth Date</i>	<i>Home Phone</i>	<i>Social Security Number</i>	<i>Marital Status</i> (only for residents of: AZ, CA, ID, LA, NV, NM, TX, WA, WI) <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> UnMarried (single, divorced, widowed)				
<i>Current Address (if different than the above Installation Address)</i>				<i>City</i>	<i>State</i>	<i>Zip</i>	
<i>Do You Currently</i> <input type="checkbox"/> Own <input type="checkbox"/> Rent	<i>Years at Current Address</i>	<i>Do or Will you own and reside at the above installation address?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No					
<i>Employer Name / Company</i>		<i>Employer's Address</i>		<i>City</i>	<i>State</i>	<i>Zip</i>	<i>How Long Employed?</i>
<i>Business Phone</i>	<i>Ext</i>	<i>Position or Title</i>	<i>Monthly Gross Salary</i> \$	<i>Circle One Below</i> FullTime PartTime Both		<i>Are you Self-Employed?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No	
<i>Employment Category Number (see 2nd page)</i>	<i>Employment Occupation Number (see 2nd page)</i>	<i>Sources of Other Income</i>				<i>Monthly Gross Salary</i> \$	
Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.							
Alimony, child support, separate maintenance received under: <input type="checkbox"/> Court Order <input type="checkbox"/> Written Agreement <input type="checkbox"/> Oral Understanding							

**EMPLOYMENT CATEGORIES**

1 = Agriculture 2 = Construction 3 = Mining	4 = Manufacturing 5 = Finance, Insurance, Real Estate 6 = Wholesale Trade	7 = Retail Trade 8 = Services 9 = Government
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**EMPLOYMENT OCCUPATIONS**

100 = Executive 101 = Manager/Supervisors 102 = Analyst/Specialists 103 = Professionals 104 = Scientists 105 = Technicians/Assistants 106 = Medical Practitioners 107 = Social/Religious Workers	108 = Legal Practitioners 109 = Teachers 110 = Arts/Entertainment/Media 111 = Sales Persons 112 = Household/Personal Care 113 = Clerical Workers 114 = Administrative/Secretarial 115 = Protective Services	116 = Food Services 117 = Skilled Trader Laborers 118 = Production Workers 119 = Retired 120 = Self-Employed 121 = Enlisted Military 122 = Unemployed 123 = Student
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**SECTION C - UTILITY INFORMATION**

<i>Electric Utility Co.</i>	<i>Gas Utility Co.</i>	<i>Water Heating Fuel Type (circle one)</i> Natural Gas   Electric   LP   Oil   Other	<i>Space Heating Fuel Type (circle one)</i> Natural Gas   Electric   LP   Oil   Other
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**SECTION D - MEASURES INSTALLATION INFORMATION**  
(Please print clearly and include a copy of your contractor's estimate(s))

<i>Measure(s) To Be Installed</i>	<i>Efficiency Level</i>	<i>Contractor Doing the Work (name/address)</i>	<i>Total Cost*</i>
<b>SEE BID SUMMARY SHEET</b>			\$
			\$
			\$
* include any associated costs such as venting, wiring or other electrical work, warranties, etc.			<b>TOTAL COST:</b> \$

**SECTION E - LOAN TERM DESIRED**

Select Desired Loan Term:    3 Years    5 Years    7 Years    10 Years   *Total # of People in Household: \_\_\_\_\_*

**SECTION F - ASSET AND DEBT INFORMATION**

(If Section B has been completed, include information about both the Applicant and Joint Applicant)

**ASSET TOTAL**

*Total Assets (checking balance + savings balance + house + automobile + other assets):*      \$

**OUTSTANDING DEBTS**      *(Attach Additional Sheet if needed)*

<i>Creditor</i>	<i>Account Number</i>	<i>Name in which the account is carried</i>	<i>Monthly Payments</i>	<i>Current Value (Balance)</i>
<i>Mortgage Holder</i>			<i>(including taxes)</i> \$	\$
<i>Automobile(s)</i>			\$	\$
			\$	\$
<i>Are you obligated to make Alimony, Support or Maintenance Payments?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No	<i>If yes, to whom (Name/Address)?</i>			<i>Amount per Month</i> \$
<i>Are you a co-maker, endorser, or guarantor on any loan or contract?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No	<i>If yes, for whom?</i>	<i>To whom?</i>		<i>Amount per Month</i> \$
<i>Are there any unsatisfied judgements against you?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No	<i>If yes, to whom owed?</i>			<i>Total Amount Owed</i> \$
<i>Have you declared bankruptcy in the last 7 years?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No	<i>If yes, what city/state?</i>			<i>Year</i>

**SIGNATURES**

All information provided on this application is correct. My (our) signature below authorizes WECC/EFS to perform a review of my credit history for the purpose of approving the loan I am requesting. The Federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applications on the basis of sex or marital status.

Applicant's Signature

Date

Joint Applicant Signature

Date