

The Green Report

A comprehensive list of government-backed and utility-funded incentives available to property owners when they construct, renovate or upgrade real property using energy-efficient, water conserving and/or renewable products, materials or measures.

MM/DD/YYYY

Prepared for: [CLIENT NAME]



NEW VISTA
SOLUTIONS



Incentifind™

Sample Report - Commercial

***This report contains a list of commercial incentives for the property located at
[property address]***



The Green Report in partnership with New Vista Solutions

THANK YOU!

Thank you for choosing IncentiFind, the nation's go-to database for green incentives. We are pleased to connect your [Commercial Retail](#) project to incentives.

STEP 01 SEARCH

In the first step of our process, SEARCH, you filled out our online survey at www.IncentiFind.com. We used your response to this survey to create a comprehensive list of incentive programs offered in your area, and then posted that list to your profile on our website. We call this list our SEARCH Results Report.

STEP 02 VERIFY

You are now in the second step of our 3-step-process, VERIFY. In this step, we provide you with a list of incentives relevant to your project's scope of work, location, and asset type. In this same deliverable we may also provide an estimate of funding for each incentive, as well as next steps to capture each incentive. We call this list [The Green Report](#).

The below list of incentives does not guarantee your, or your project's, eligibility or award. Please review the below list of incentives with IncentiFind to determine which incentives you want to APPLY to. We have indicated the incentives we can assist you in APPLYing to, as well as estimated the number of hours it will take to APPLY.

02 VERIFY is a service of IncentiFind, Inc.. Incentives, prices, fees, or estimates referenced in this document do not constitute a guarantee that funding will be received. Any arrangement as to services, their associated fees, must be contracted for in a separate written agreement. This document provided is without any representation or warranty. IncentiFind, Inc. does not warrant that the information contained in this document is complete, accurate, or misleading. IncentiFind, Inc. does not offer legal, financial, tax, or regulatory advice. Incentives listed are current as of the date shown on this document. This document is not intended for distribution or reproduction. This document is not intended to be used for any other purposes other than for the property listed below, property owner's use (or owner's representative use), and is based on the project details provided in the completion of our online survey.

ONLINE SURVEY RESPONSE

Website Survey Completed: MONTH DD, 2018

Client ID: 78702 CR Last Name

Name: First Last Name

Email: propertyowner@commercial.company.com

Address: 123 Street Austin, Texas 78702

City, County, State: Austin, Travis, Texas

Project Type: Existing Building (> 20 years), Commercial Retail (CR)

Project Size: 10,000-25,000 SF

Utility provider: Austin Energy

Green Technologies/ Practices: Renewables (solar, wind, geothermal, etc.), Energy Efficiency Indoor (LED, HVAC, Window films, etc.)

INCENTIVE SUMMARY

	Incentive	Rebate	Tax	Grant	Other	EE*	WC*	Renewable	Other	\$0-5K	\$5K-10K	\$10K-20K	\$20K-30K	\$30K-50K	\$50K+	Other	
Utility	1 AE - Solar PBI				X			X								X	
	2 AE - High Performance Lighting	X				X										X	
City	City of Austin - None																
County	3 Solar Exemption, Tax Code 11.27		X					X									X
	4 Solar Tax Deduction, Tax Code 171.107		X					X					X				
State	5 Solar ITC		X					X						X			
	6 MACRS		X					X							X	X	

The following pages detail each of the incentives you see listed in this chart. The numbers next to the incentive name correspond to the incentive details provided for you below. Incentives are grouped and listed below by Utility, City, County, State, and Federal.

*Energy Efficiency (EE), Water Conservation (WC)

LOCAL: AUSTIN

Org - Incentive Name Eligible Scope Est. Funds Est. Time Next Steps to Capture Est. Hours to APPLY

<p>1. Austin Energy - Commercial Solar Performanced-Based Incentive (PBI)</p> <p><i>Yellow highlighted text indicates a hyperlink that directs the borrower to the appropriate website.</i></p>	<p>Solar Performance-Based Incentive (PBI) earns you credit on your monthly electric bill for the power your solar PV system generates for 10 years</p>	<p>The PBI rate is determined using a three-tiered incentive structure: small commercial (includes most non-profits), medium commercial, and large commercial.</p>	<ul style="list-style-type: none"> - On-site assessment is required - Report of recommendations is then provided - Allow 90 days after application is received per rebate 	<ol style="list-style-type: none"> 1. You must have Austin Energy commercial electric utility account at service address where PV system will be installed. 2. PV systems must be connected to electric service panel associated with an Austin Energy commercial electric utility account. 3. You must use a participating contractor. 4. You must apply and receive a Letter of Intent (LOI) prior to system installation to be eligible. 	<p>The participating contractor you select submits an application to Austin Energy on your behalf.</p> <p>IncentiFind can help your verify that all information is correct before submitting.</p>
<p>2. Austin Energy - High Efficiency Lighting</p>	<p>Existing commercial buildings only rebate for</p>	<p>Max rebate: Rebates cannot exceed 50% of the total job costs, including</p>	<ul style="list-style-type: none"> - Initial and final site visits are required - All rebate applications are online. You must 	<ol style="list-style-type: none"> 1. You must have Austin Energy commercial electric utility account at service address where PV system will be installed. 	<p>IncentiFind can help you APPLY to this incentive. Our estimated hours to APPLY: 9-12 hours*</p>

		<p>materials, installation, and tax. You must confirm the total project cost.</p>	<p>submit your rebate application prior to installation (Austin Energy must approve any exceptions)</p> <p>- You will receive your rebate within four to six weeks after we give final approval for your rebate application</p>	<p>2. If your building is over 10,000 sq ft you must comply with the (ECAD ordinance) if your business is located within the Austin city limits.</p> <p>3. You operate at least four consecutive hours daily between 2:00 p.m. and 8:00 p.m. weekdays, June 1 through September 30.</p> <p>4. All lighting retrofit projects require a site visit for the verification of existing lighting prior to work being started in the facility.</p>	<p><i>*IncentiFind will work with you and your lighting installer to complete all required paperwork.</i></p>
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COUNTY: TRAVIS COUNTY

Org - Incentive Name Eligible Scope Est. Funds Est. Time Next Steps to Capture Est. Hours to APPLY

<p>3. Travis County - Solar and Wind-Powered Energy Device Exemption, Tax Code 11.27</p>	<p>Property Tax Exemption, Solar Appraised using Tax Code Section 23.26(c)</p>	<p>Exemption applies to the added value, therefore property taxes are evaluated on PRE-SYSTEM installation</p>	<p>Must qualify on Jan 1. General deadline for filing an exemption application is before May 1.</p> <p>One-Time Application, Filed with property tax.</p> <p>If deadline is missed, file next Tax Year (retro-actively)</p>	<ol style="list-style-type: none"> 1. The law requires property owners to apply for an exemption in most circumstances. IncentiFind recommends that you work with your tax consultant, CPA, or counsel. 2. Review Comptroller Form 50-123. Counties are required to accept Comptroller’s Form. County Appraisal District (where property is located) is ultimately the decision maker. 3. Take “before” photos immediately of the property. 4. File with the appraisal district where the property is located. 5. Exemption lasts until the system is removed. 	<p>IncentiFind can help you APPLY to this incentive. Our estimated hours to APPLY: 3-6 hours*</p> <p><i>*IncentiFind can either work with your CPA to submit your application, or we can offer our CPA partner who executes these forms nationwide for our property owners.</i></p>
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STATE: TEXAS

Org - Incentive Name Eligible Scope Est. Funds Est. Time Next Steps to Capture Est. Hours to APPLY

<p>4. Texas Comptroller - Solar Energy Device Franchise Tax Deduction, Tax Code 171.107</p>	<p>Tax Deduction on Franchise Tax or Corporate Tax</p>	<p>(1) total cost of the system may be deducted from company's taxable capital, or (2) 10% of amortized cost of solar energy equipment may be deducted from company's income Option 1: Deduct total cost of the system (conform to federal</p>	<p>Due before May 15th each tax year to the Texas Comptroller Begin on the month in which the device is placed in service in this state.</p>	<ol style="list-style-type: none"> 1. The law requires property owners to apply for an exemption in most circumstances. Incentifind recommends that you work with your tax consultant, CPA, or counsel. 2. Make sure your device is acceptable. 3. A taxable entity that makes a deduction under this section shall file with the comptroller an amortization schedule showing the period in which a deduction is to be made. On the request of the comptroller, the taxable entity shall file with the comptroller proof of the cost of the solar energy device or proof of the device's operation in this state. 	<p>Incentifind can help you APPLY to this incentive. Our estimated hours to APPLY: 3-6 hours*</p> <p><i>*Incentifind can either work with your CPA to submit your application, or we can offer our CPA partner who executes these forms nationwide for our business owners.</i></p>
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		<p>depreciation schedule) and spread over 60 months (5 years)</p> <p>Option 2: Deduct 10% it on the long-form 05-158; line 28</p> <p>Break it out over 5 years</p>			
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FEDERAL

Org - Incentive Name Eligible Scope Est. Funds Est. Time Next Steps to Capture Est. Hours to APPLY

<p>5. Solar Investment Tax Credit (ITC)</p>	<p>Tax Credit, Dollar for dollar reduction</p>	<p>30% based on total value of PV system</p> <p>Onsite generation and use.</p>	<p>Federal Filing.</p> <p>One-time use only.</p>	<p>1. The law requires property owners to apply for an exemption in most circumstances. Incentifind recommends that you work with your tax consultant, CPA, or counsel.</p>	<p>Incentifind can help you APPLY to this incentive. Our estimated hours to APPLY: 4-6 hours*</p> <p><i>*Incentifind can either work with your CPA, or we can offer our CPA partner who executes these forms nationwide.</i></p>
<p>6. Modified Accelerated Cost Recovery System (MACRS)</p>	<p>Tax Deduction, for the recovery of the cost of tangible property over the useful life of the property. MACRS is the current depreciation method for most property.</p>	<p>100% depreciation of equipment installed during a FY</p> <p>Equipment placed in service during FY 2018 can qualify for 40% bonus depreciation</p>	<p>Federal Filing.</p> <p>Annual Deductions</p> <p>5-year schedule for solar.</p>	<p>1. The law requires property owners to apply for an exemption in most circumstances. Incentifind recommends that you work with your tax consultant, CPA, or counsel.</p> <p>2. Make sure your system equipment is eligible.</p> <p>3. For equipment on which ITC is claimed, owner must reduce the project's depreciable basis by ½ the value of 30% ITC.</p>	<p>Incentifind can help you APPLY to this incentive. Our estimated hours to APPLY: 4-6 hours*</p> <p><i>*Incentifind can either work with your CPA, or we can offer our CPA partner who executes these forms nationwide.</i></p>