


Participating Organization: Community Partner Funding
Organización participante: Financiación de socios comunitarios



Residencial y Multifamiliar existente | Detalles de proyecto | Formulario 320CPF_ES

Para que lo complete el cliente y la organización participante

Steps to completion:

-  **1 Make** an energy saving improvement in a qualifying residence.
- 2 Complete** application information, including:
 - Customer signature
 - Participating Organization or Contractor signatures
 - Invoices billing the customer for purchase and installation marked "Paid in full"
 - If this is an instant incentive project:
 - Invoice must show incentive deductions
- 3 Submit** documentation via email to communitypartners@energytrust.org
- 4 Receive** your check. Please allow four to six weeks for incentive processing after completed application and supporting documentation are received.

Need-to-know information:

- **This form should be completed by the Customer and Participating Organization or Contractor.**
- **Energy Trust must receive applications within 60 days from the date of installation.**
- **All information must be completed for processing; incomplete information will result in delayed payment or disqualification.**

Customer Information

This home is ☐ Owner occupied ☐ A rental property I own*

**If the home is a rental property, and the owner or manager is receiving the incentive directly, a complete, accurate, and verifiable W-9 is required. Visit www.energytrust.org/w9.*

Site address _____ City _____ State _____ Zip _____

Primary phone ☐ Home ☐ Work ☐ Cell _____ Other Phone ☐ Home ☐ Work ☐ Cell _____

Utility Information

Electric utility: ☐ PGE ☐ Pacific Power ☐ Other _____

Gas utility: ☐ NW Natural ☐ Cascade Natural Gas ☐ Avista ☐ Other _____

Site Information

Year built _____ Square feet _____ Number of levels _____

Primary heating system (**check one**) ☐ Electric furnace ☐ Ductless heat pump ☐ Wood ☐ Electric baseboard ☐ Gas furnace ☐ Propane ☐ Ducted heat pump ☐ Gas fireplace ☐ Other _____

Water heating fuel ☐ Electricity ☐ Natural gas ☐ Propane

Foundation/basement ☐ Garage/basement combo ☐ Crawlspace w/ vapor barrier ☐ Half basement ☐ Crawlspace ☐ Full basement ☐ Slab on grade

Home type ☐ Single-family ☐ Manufactured ☐ Rowhouse ☐ Townhouse ☐ Duplex ☐ Triplex ☐ Fourplex

Energy Trust Incentive Recipient

Who is requesting Energy Trust incentives for home energy upgrades detailed in this form?

☐ Participating Organization ☐ Contractor (instant incentive amount listed on invoice)

Instructions for Signatures

Customer	The Customer is required to sign this form.
Participating Organization	Participating Organization is required to sign this form.
Contractor	Contractor's signature is required if Contractor performed the energy upgrade and is requesting the Energy Trust incentive.

Residential

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Este **Formulario 320CPF** se utiliza para completar mejoras en el hogar bajo el programa de Financiamiento de Socios Comunitarios (CPF). Al firmar a continuación, el Cliente y la Organización Participante han acordado que Energy Trust emitirá el cheque de financiamiento para las actualizaciones de energía que cumplan con los requisitos de Energy Trust a la Organización Participante o Contratista nombrado a continuación. Energy Trust puede negar fondos para cualquier mejora de energía que no cumpla con los requisitos de Energy Trust o por cualquier otra razón, a su entera discreción.

*This **Form 320CPF** is used for completed home upgrades under the Community Partner Funding program. By signing below, Customer and Participating Organization have agreed that Energy Trust will issue the funding check for energy upgrades that meet Energy Trust requirements to the Participating Organization or Contractor named below. Energy Trust may deny funding for any energy upgrades that do not meet Energy Trust requirements or for any other reason, in its sole discretion.*

Nombre y firma del cliente

Customer Name and Signature

Con su firma, el cliente acepta todos los términos y condiciones de este formulario. El cliente autoriza a la organización participante o el contratista a presentar esta autorización y todas las facturas o documentos de las medidas correspondientes ante Energy Trust en representación del cliente para recibir los fondos disponibles para las medidas de ahorro de energía que la organización participante o el contratista ha completado para el cliente..



Firma del cliente
Customer signature

Nombre completo (en letra de molde, el mismo que figura en la cuenta) **Fecha**
Full name (please print and use same name as on invoice) Date

Nombre y firma de la organización participante

Participating Organization Name and Signature

Con su firma la organización participante certifica que esta autorización, las facturas y los documentos correspondientes a las medidas adjuntos son completos y precisos, y que todas las mejoras asociadas a esta solicitud de financiación se completaron al momento de la fecha de la firma. Para recibir incentivos, todo el trabajo debe cumplir con el [Manual de Especificaciones del programa Residencial](#) y todos los demás requisitos de Energy Trust.



Firma de la organización participante
Participating Organization signature

Nombre completo (en letra de molde)
Full name (please print)

Fecha
Date

Organización Participante
Participating Organization company

Fecha de instalación
Install date

Para que lo complete el cliente y la organización participante

////////////////////////////////////

Contractor Name and Signature

**Fecha**
Date

Fecha de instalación
Install date

Código Postal
Zip

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Referral Section: Indicate project-completing organization and referring organization.

Project Completed by:	Referral Received from:

Heating & Cooling

Ductless Heat Pump Incentive

► **One incentive per residence. Residence must be located in Oregon and primarily heated by PGE or Pacific Power.**

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Ductless heat pump	Must have an HSPF2 of 8.10 or greater as rated by the Air Conditioning, Heating & Refrigeration Institution (AHRI.net.org) and replace electric resistance heat as the residence's primary heating system. Primary indoor unit must be installed in the main living space (e.g., living room, great room).	<input type="checkbox"/> \$2,000 Multifamily property <input type="checkbox"/> \$1,800 Site built home <input type="checkbox"/> \$3,500 Manufactured home <input type="checkbox"/> No-Cost, income-qualified option Incentive amount requesting:

AHRI Certificate Number:

Installed Cost \$:

What type of heating system did this replace?

(Systems displacing natural gas or any other non-electric fuel **will not** qualify for incentive.)

☐ Electric furnace ☐ Electric radiant heat ☐ Electric wall heat ☐ Electric baseboard ☐ Other:

Outdoor Unit

Qty of outdoor units: Total capacity (BTUs): HSPF2:

Manufacturer: Model Number: Serial #:

Indoor Unit

Qty of indoor units: Primary Living Space Room Type:

Manufacturer: Model Number***:

Did this project include ceiling cassettes or a concealed air handler serving a slim/short duct run? ☐ Yes ☐ No

Did the installation add heating to any previously unconditioned rooms? (multi-zone projects only) ☐ Yes ☐ No

Secondary Heat Source

Is there an alternate, non-electric heating source being used to heat the primary living space? If so, what is it?**

☐ Oil heater ☐ Propane heater ☐ Gas stove ☐ Wood stove ☐ Pellet stove ☐ Gas fireplace
☐ No secondary heating system present ☐ Other:

* Energy Trust incentive is intended to offset the cost of one outdoor unit and one indoor unit; additional units are unlikely to produce significant additional energy savings. If more than one outdoor and/or indoor unit is installed, please provide information for the highest capacity unit.

** Presence of an additional non-electric heating source that serves the same primary living space as the ductless heat pump can reduce the amount of electric energy savings and impact the project's incentive amount.

***Invoice documentation for ductless heat pump projects must include all model numbers for the indoor and outdoor components of the system.

Residential

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energytrust.org

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► Residence must be located in Oregon and primarily heated by PGE or Pacific Power.

Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> Ducted Heat Pump	HSPF2 ¹ 7.50 or greater. Must be residence's primary heat source and replace electric forced air furnace . Thermostat lockout must be set to 35°F or lower if electric furnace auxiliary heat present. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. No-cost option requires pre-approval from communitypartners@energytrust.org.	<input type="checkbox"/> \$4,000 Site built home <input type="checkbox"/> \$5,000 Small multifamily site <input type="checkbox"/> No-cost, income-qualified option Incentive amount requesting:
<input type="checkbox"/> Extended capacity heat pump	Must be residence's primary heating source. Not required to replace electric heat . Heat pump must be a central ducted system included in Energy Trust's list of qualifying products . Controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations when available. Heat pump cannot have a backup gas heating system. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. Indoor Configuration: Eligible systems configurations must include a central ducted system serving the primary living space of the home.	<input type="checkbox"/> \$2,000 Single family site <input type="checkbox"/> \$2,400 Small multifamily
<input type="checkbox"/> Extended capacity heat pump – replacing electric forced air furnace	Must replace electric forced air furnace as residence's primary heating source. Heat pump must be a central ducted system included in Energy Trust's list of qualifying products . Controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations when available. Heat pump cannot have a backup gas heating system. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. Indoor Configuration: Eligible systems configurations must include a central ducted system serving the primary living space of the home.	<input type="checkbox"/> \$6,000 Single family site <input type="checkbox"/> \$6,650 Small Multifamily
What type of heating system did this replace? <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Wall heat <input type="checkbox"/> Electric furnace <input type="checkbox"/> Other:		
AHRI Certificate Number:		Installed Cost \$
HSPF2:	EER2:	SEER2:
Manufacturer:	Model:	Serial #:

¹ Applicable HSPF2, EER2 or SEER2 requirements apply to equipment manufactured after January 1, 2023. If the equipment installed was manufactured prior to January 1, 2023, verify eligibility at energytrust.org/eestandards.

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Heat Pump Controls		
► Residence must be located in Oregon and primarily heated by PGE or Pacific Power.		
Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> New Heat Pump Controls	(When replacing an existing heat pump with a new heat pump) Must be added to a new heat pump with electric furnace auxiliary heat. Heat pump must be home's primary heat source. Visit http://www.energytrust.org/heatpumpcontrols for eligible models and more information. Thermostat must be set to 35°F lockout or as close as possible. Cannot be combined with ducted heat pump incentive or other controls incentives.	<input type="checkbox"/> \$250
<input type="checkbox"/> Existing Heat Pump Controls	Must be added to an existing heat pump with electric furnace auxiliary heat. Heat pump must be home's primary heat source. Visit http://www.energytrust.org/heatpumpcontrols for eligible models and more information. Thermostat must be set to 35°F lockout or as close as possible. Cannot be combined with other controls incentives or ducted heat pump incentives.	<input type="checkbox"/> \$250
Thermostat		
Lockout temperature: ° F		Installed Cost \$
Manufacturer	Model Name	Model #

Gas Furnace		
► Oregon residences must be serviced by NW Natural, Cascade Natural Gas or Avista. Washington residences must be serviced by NW Natural.		
Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> Gas Furnace	95% annual fuel utilization efficiency (AFUE) or greater. Gas furnaces used as backup for high efficiency heat pumps, also known as hybrid systems, are not eligible.	<input type="checkbox"/> \$2,900
What type of heating system did this replace?		
<input type="checkbox"/> Functioning, non-condensing gas furnace <input type="checkbox"/> Electric Furnace <input type="checkbox"/> Oil <input type="checkbox"/> Other:		
ECM? <input type="checkbox"/> Yes <input type="checkbox"/> No	AFUE: %	Installed Cost: \$
Manufacturer:	Model:	Serial #:

Smart Thermostat		
► Residence must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Washington residences must be serviced by NW Natural.		
Upgrade type	Requirements	CPF Incentive
<input type="checkbox"/> Smart Thermostat	Residence must be primarily heated by an electric furnace, gas furnace, or ducted heat pump. Community Partner must indicate whether thermostat was connected to Wi-Fi. Visit http://www.energytrust.org/thermostat for eligible models. Cannot be combined with other controls incentives.	<input type="checkbox"/> \$250
Thermostat		
Manufacturer:		Installed Cost \$
Model Name:		Model #:

Residencial y Multifamiliar existente | Detalles de proyecto | Formulario 320_{CPF_ES}

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Water Heating

Heat Pump Water Heater			
► Residence must be located in Oregon and primarily heat water with electricity provided by PGE or Pacific Power.			
Upgrade type	Requirements	CPF Incentive	
<input type="checkbox"/> Heat Pump Water Heater	Eligible models must meet Northwest Energy Efficiency Alliance's (NEEA's) Advanced Water Heater Specification Tier 3 to qualify for this incentive. Tank may be any size. A midstream incentive may be available through retailers and distributors. No-cost option requires pre-approval from communitypartners@energytrust.org .	<input type="checkbox"/> \$240 <input type="checkbox"/> No-cost, income-qualified option Incentive request amount: \$	
Water Heater			
Manufacturer:		Model:	
Serial number:	UEF:	Installed cost:	
Location installed: <input type="checkbox"/> Garage <input type="checkbox"/> Basement <input type="checkbox"/> Crawlspace <input type="checkbox"/> Main home <input type="checkbox"/> Other:			

Weatherization

Windows					
► Windows must be installed in a heated area of the home and replace single or double paned windows. ► Properties in Oregon must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. ► Properties in Washington must be primarily heated by NW Natural.					
Window type	Installed cost	U-Value	Total area installed	Total # of windows installed	CPF Incentive (per sq. ft)
<input type="checkbox"/> U-Value < 0.22	\$	U-.	sq. ft.		<input type="checkbox"/> \$1.50
<input type="checkbox"/> U-Value 0.23 – 0.27	\$	U-.	sq. ft.		<input type="checkbox"/> \$1.00
<input type="checkbox"/> For enhanced CPF Windows Incentives, I have provided the Windows Addendum with Existing Condition form					
Supporting documentation must be attached to all window applications: <ul style="list-style-type: none">• Proof of U-Value for each window• Proof of size for each window• Paid in full purchase and install invoicing		<input type="checkbox"/> Accepted proof of U-Value:	Attach copies of the NFRC stickers for all windows installed OR the window manufacturer's packing slip with U-Values listed for all windows installed.		
		<input type="checkbox"/> Accepted proof of size:	Attach an itemized invoice showing window dimensions and U-Value from manufacturer, distributor, retailer or contractor for all windows installed OR a completed Windows Addendum with Existing Type form.		

Residencial y Multifamiliar existente | Detalles de proyecto | Formulario 320_{CPF_ES}

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Insulation in Manufactured Homes									
<p>► Oregon residences must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. <i>Washington residences must be primarily heated by NW Natural.</i></p>									
Insulation type	Max beginning R-value	Insulate to:	Quantity installed	Beginning R-value	Ending R-value	Cavity filled?	Installed cost	CPF Incentive (per sq. ft)	
								Electric	Gas
Floor	R-11	R-22 or fill cavity	sq.ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$1.45	<input type="checkbox"/> Up to \$1.76
Attic	R-11	R-30 or fill cavity	sq.ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$2.13	<input type="checkbox"/> Up to \$1.74

Insulation in Single Family and Small Multifamily Homes									
<p>► Oregon residences must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. ► Washington residences must be primarily heated by NW Natural.</p>									
Insulation type	Max beginning R-value	Insulate to:	Quantity installed	Beginning R-value	Ending R-value	Cavity filled?	Installed cost	CPF Incentive (per sq. ft)	
								Electric	Gas
Wall (includes rim joist and knee wall)	R-4	R-11 or fill cavity	_____ sq.ft. (total of all types)	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$2.32	<input type="checkbox"/> Up to \$3.30
<p>• If applying for multiple wall insulation types, provide beginning R-value of wall insulation type with largest sq. ft installed. • For rim joist insulation to qualify, must be insulated to R-15 or fill cavity. For knee wall insulation to qualify, must be insulated to R-15 for 2x4 cavities; R-21 for 2x6 cavities</p>									
Floor	R-11	R-30 or fill cavity	sq.ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$1.09	<input type="checkbox"/> Up to \$3.65
Attic (R0-R11)	R-11	R-38	sq.ft.	R-	R-	-	\$	<input type="checkbox"/> Up to \$3.00	
Attic (R-12 to R-18)	R-18	R-38	sq.ft.	R-	R-	-	\$	<input type="checkbox"/> Up to \$2.49	
Attic Insulation with Additional Costs	<p>If this attic insulation project included any of the following costs that caused the project to cost more than \$3.00/sq. ft, higher incentives may be available. Use the excel spreadsheet insulation calculator to identify the higher incentive option and submit the calculator in addition to this form <i>Existing insulation must be R-18 or less. Must insulate to R-38 or greater or fill cavity.</i></p>							<input type="checkbox"/> Higher Incentive Option	

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► **Funds may be available for reducing customer costs for qualifying upgrades and/or repairs that are required to enable other upgrades identified on this form. Identify the additional funding source, select the relevant uses of funds, and input the related costs and incentive request amount. Cannot be layered with other Federal funding grants.**

Funding Source	Requirements	Incentive
<input type="checkbox"/> Climate Pollution Reduction Grant (CPRG) - Federal Funds	An insulation measure must be selected, above. For single-family and manufactured homes. Provides up to \$2,000 in flexible funds for projects that include an insulation measure. Funds can be used to reduce customer costs for insulation or, if approved, for repairs enabling insulation or weatherization. Talk to your account manager for details.	Total Enabling/Repair Cost:
	Use of funds: <div> <input type="checkbox"/> Reduce Customer Cost. Insulation Cost Only </div> <div> <input type="checkbox"/> Ductwork <input type="checkbox"/> Electrical <input type="checkbox"/> Enabling Upgrade </div> <div> <input type="checkbox"/> Hazard Mitigation <input type="checkbox"/> Moisture <input type="checkbox"/> Weatherization </div> <div> <input type="checkbox"/> Other repair: </div>	\$ Incentive Request: \$

AUTORIZACIÓN: Esta autorización se debe llenar por completo, con respuestas veraces y precisas. Los clientes pueden guardar una copia de esta autorización y cualquier otra documentación adjunta que presenten a Energy Trust para este programa. Energy Trust no será responsable por la documentación perdida con respecto a esta solicitud. La organización que presente este formulario debe ser una organización participante en regla en el programa de financiación de socios comunitarios de Energy Trust antes de que se pueda procesar o pagar cualquier fondo. Los fondos están sujetos a disponibilidad y pueden cambiar. **Espere de cuatro a seis semanas para el procesamiento de los fondos.**

CLIENTE: La persona que firma este formulario es el cliente. Con su firma, el cliente certifica que cumple con los requisitos para los servicios y los fondos de Energy Trust.

DERECHOS DE PROPIEDAD: El cliente declara que tiene derecho a autorizar la instalación de las medidas de ahorro de energía en la propiedad en la cual se completan y/o se instalan esas medidas y que se obtendrá el consentimiento que sea necesario del dueño del edificio.

ACCESO Y EVALUACIÓN: Energy Trust y/o sus representantes pueden solicitar acceso al inmueble y pueden revisar y evaluar la propiedad durante y después de completar el proyecto. El cliente se compromete a brindarles acceso razonable a la propiedad para los fines aquí descritos.

DIVULGACIÓN DE INFORMACIÓN: El cliente está de acuerdo en que Energy Trust puede incluir el nombre del cliente, los servicios de Energy Trust y los ahorros de energía que resulten en informes u otros documentos que se presenten a Energy Trust, su Junta Directiva, la Comisión de Servicios Públicos de Oregón (*Oregon Public Utility Commission*), el Departamento de Energía de Oregón (*ODE*), Servicios Comunitarios y de Vivienda de Oregón (*Oregon Housing & Community Services*) y/o la legislatura de Oregón. Energy Trust tratará toda la demás información recabada en evaluaciones de manera confidencial y solo se presentará en los informes como datos estadísticos.

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NOTIFICACIÓN A CLIENTES: La organización participante informará a los clientes que este servicio se suministra como parte del programa de modernización de viviendas de Energy Trust y también les brindará información sobre Energy Trust y sus programas. La organización participante también les dará a los clientes su información de contacto con su número de teléfono y dirección, para permitirles que los clientes le informen cualquier preocupación y le hagan cualquier pregunta sobre los servicios durante el programa.

VERIFICACIÓN DE CALIDAD DE TRABAJO: Antes de emitir el pago de fondos, la Organización participante verificará que las medidas de ahorro energético instaladas cumplen con los requisitos del programa y los estándares de especificaciones de aislamiento climático de Energy Trust. La temperatura a la intemperie puede afectar este proceso de verificación. **PAGO:** Los fondos por las medidas elegibles se le pagarán a la Organización participante después de: (i) completar y/o instalar las medidas de ahorro de energía; (ii) verificar que se han completado y/o instalado las medidas; (iii) presentar toda la documentación requerida a tiempo. Los fondos se le pagarán directamente a la Organización participante.

MONTO DE LOS FONDOS: El monto de los fondos no puede ser mayor que el costo total de la instalación. Los fondos por las medidas de ahorro de energía completadas y o instaladas por medio de programas de Energy Trust están limitados a los montos provistos de

Energy Trust. Estos montos están sujetos a cambios. Los montos disponibles actualmente están publicados en el sitio web www.energytrust.org. Si tiene alguna pregunta, comuníquese con Energy Trust.

RESPONSABILIDAD FISCAL: Energy Trust no es responsable de ninguna carga fiscal que pueda ser impuesta al cliente como resultado del pago de fondos ni como resultado de financiamiento. Energy Trust no está suministrando ningún asesoramiento fiscal y ninguna comunicación de Energy Trust se ha escrito ni creado con la finalidad de usarse, ni puede usarse, para evadir multas según el código de rentas internas.

NO RESPALDO: Energy Trust no avala a ningún fabricante, contratista ni producto. El hecho de que aparezcan los nombres de fabricantes, contratistas, productos o sistemas específicos en esta solicitud no constituye un respaldo. El que no se haya mencionado a fabricantes, contratistas, productos o sistemas no implica que sean inadecuados ni defectuosos en lo absoluto.

DIVULGACIÓN DE INFORMACIÓN DE ENERGÍA: El cliente autoriza a Energy Trust a acceder a la información sobre el uso de energía del inmueble en el cual se han completado y/o instalado medidas de ahorro de energía mediante el acceso a las cuentas de electricidad y gas natural de la dirección física del proyecto. El cliente se compromete a brindar otra asistencia razonable a Energy Trust para obtener tal información.

EXENCIÓN DE RESPONSABILIDAD: El cliente entiende que aunque Energy Trust le suministre fondos a la Organización participante para respaldar medidas de ahorro de energía para el cliente, Energy Trust no supervisa el trabajo realizado para el cliente ni tampoco es responsable de ninguna manera por la terminación adecuada de tal trabajo ni el desempeño adecuado de los productos adquiridos.

Energy Trust simplemente suministra fondos para asistir al cliente en la implementación de medidas de ahorro energético. El cliente asume el riesgo de toda pérdida o daño(s) que pueda sufrir en relación con la instalación de las medidas. Energy Trust no garantiza ningún resultado de ahorro energético en particular al aprobar esta solicitud ni mediante ninguna otra de sus acciones.

Residential

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