

NC

FILE

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA INC.



NORTH
AMERICAN
ENERGY
ADVISORY

1315 Cleveland Street
Clearwater, FL 33755

15-1251-EL-AGG

July 01, 2015

Public Utilities Commission of Ohio
Docketing Division
180 East Broad Street
Columbus Ohio 43215-3793

PUCO

2015 JUL -6 PM 2:39

RECEIVED-DOCKETING DIV

RE: **Customer Acquisition Specialists of America Inc. / State of Ohio Certificate-2321981**
Foreign Corporation License Doc#201423901182 / Effective Date 08/25/2014

North American Energy Advisory / State of Ohio Certificate - 2398858
Trade Name Registration Doc #201514801049 / Effective Date 05/28/2015

Dear Sir or Madam,

Please find the enclosed Certification Application for Power Brokers. The purpose of this submission is to request that the Ohio Public Utilities Commission review and approve the Applicants request for an Ohio Electric Power Broker/Marketer License.

Customer Acquisition Specialists of America, Inc., dba North American Energy Advisory intends to service both commercial and industrial customers throughout the State of Ohio immediately upon receipt of the PUC's approval to do so.

As a Natural Gas Broker/Marketer, we take a proactive role in ensuring the highest level of professionalism with regard to our activities as well as the service we provide to both our Suppliers and Customers.

In addition, we agree to fully comply with all applicable PUC Rules and Service Regulations including all Local, State and Federal Laws.

Thank you in advance for your assistance. Should you have any questions or require additional information, please feel free to contact me directly. I can be reached by phone at (727) 278-9020 or by email, Jeannie@NAEA.TODAY

Best Regards,

Jeannie Mastorides

Jeannie Mastorides
Sr. Vice President of Administration
Corporation Legal & Regulatory Director

Mobile: (727) 278-9020
Direct: (727) 865-4165

This is to certify that the images appearing are an accurate and complete reproduction of a case file document delivered in the regular course of business.
Technician AD Date Processed 7/6/15



**Public Utilities
Commission**

PUCO USE ONLY		
Date Received	Case Number	Version
	- EL-AGG	December 2014

**CERTIFICATION APPLICATION FOR AGGREGATORS/POWER
BROKERS**

Please print or type all required information. Identify all attachments with an exhibit label and title (Example: Exhibit A-5 Experience). All attachments should bear the legal name of the Applicant. Applicants should file completed applications and all related correspondence with the Public Utilities Commission of Ohio, Docketing Division; 180 East Broad Street, Columbus, Ohio 43215-3793.

**This PDF form is designed so that you may input information directly onto the form.
You may also download the form, by saving it to your local disk, for later use.**

A. APPLICANT INFORMATION

A-1 Applicant's legal name, address, telephone number and web site address

Legal Name CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
Address 1315 CLEVELAND STREET, CLEARWATER FLORIDA 33755
Telephone # (800) 920-4631 Web site address (if any) NORTHAMERICANENERGYADVISORY.COM

A-2 List name, address, telephone number and web site address under which Applicant will do business in Ohio

Legal Name NORTH AMERICAN ENERGY ADVISORY
Address 1315 CLEVELAND STREET, CLEARWATER FLORIDA 33755
Telephone # _____ Web site address (if any) NORTHAMERICANENERGYADVISORY.COM

A-3 List all names under which the applicant does business in North America

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
NORTH AMERICAN ENERGY ADVISORY

A-4 Contact person for regulatory or emergency matters

Name JEANNIE KOUVAS MASTORIDES
Title SR VICE PRESIDENT OF ADMINISTRATION / LEGAL / REGULATORY

Business address 1315 CLEVELAND STREET, CLEARWATER, FLORIDA 33755
Telephone # (727) 865-4165 Fax # _____
E-mail address JEANNIE@NAEA.TODAY

A-5 Contact person for Commission Staff use in investigating customer complaints

Name MATT HELLAND
Title SR VICE PRESIDENT OF CUSTOMER & CLIENT RELATIONS
Business address 1315 CLEVELAND STREET, CLEARWATER, FLORIDA 33755
Telephone # (855) 396-8870 Fax # _____
E-mail address MATT@NAEA.COM

A-6 Applicant's address and toll-free number for customer service and complaints

Customer Service address 1315 CLEVELAND STREET CLEARWATER FLORIDA 33755
Toll-free Telephone # (844) 674-5465 Fax # (866) 602-2791
E-mail address CUSTOMERSERVICE@NAEA.TODAY

A-7 Applicant's federal employer identification number # 593600275

A-8 Applicant's form of ownership (check one)

- | | |
|--|--|
| <input type="checkbox"/> Sole Proprietorship | <input type="checkbox"/> Partnership |
| <input type="checkbox"/> Limited Liability Partnership (LLP) | <input type="checkbox"/> Limited Liability Company (LLC) |
| <input type="checkbox"/> Corporation | <input checked="" type="checkbox"/> Other <u>S-CORPORATION</u> |

A-9 (Check all that apply) Identify each electric distribution utility certified territory in which the applicant intends to provide service, including identification of each customer class that the applicant intends to serve, for example, residential, small commercial, mercantile commercial, and industrial. (A mercantile customer, as defined in (A) (19) of Section 4928.01 of the Revised Code, is a commercial customer who consumes more than 700,000 kWh/year or is part of a national account in one or more states).

- | | | | | |
|---|--------------------------------------|--|--|--|
| <input checked="" type="checkbox"/> First Energy | | | | |
| <input checked="" type="checkbox"/> Ohio Edison | <input type="checkbox"/> Residential | <input checked="" type="checkbox"/> Commercial | <input checked="" type="checkbox"/> Mercantile | <input checked="" type="checkbox"/> Industrial |
| <input checked="" type="checkbox"/> Toledo Edison | <input type="checkbox"/> Residential | <input checked="" type="checkbox"/> Commercial | <input checked="" type="checkbox"/> Mercantile | <input checked="" type="checkbox"/> Industrial |
| <input checked="" type="checkbox"/> Cleveland Electric Illuminating | <input type="checkbox"/> Residential | <input checked="" type="checkbox"/> Commercial | <input checked="" type="checkbox"/> Mercantile | <input checked="" type="checkbox"/> Industrial |
| <input checked="" type="checkbox"/> Duke Energy | <input type="checkbox"/> Residential | <input checked="" type="checkbox"/> Commercial | <input checked="" type="checkbox"/> Mercantile | <input checked="" type="checkbox"/> Industrial |
| <input checked="" type="checkbox"/> Monongahela Power | <input type="checkbox"/> Residential | <input checked="" type="checkbox"/> Commercial | <input checked="" type="checkbox"/> Mercantile | <input checked="" type="checkbox"/> Industrial |
| <input checked="" type="checkbox"/> American Electric Power | | | | |
| <input type="checkbox"/> Ohio Power | <input type="checkbox"/> Residential | <input checked="" type="checkbox"/> Commercial | <input checked="" type="checkbox"/> Mercantile | <input checked="" type="checkbox"/> Industrial |
| <input type="checkbox"/> Columbus Southern Power | <input type="checkbox"/> Residential | <input checked="" type="checkbox"/> Commercial | <input checked="" type="checkbox"/> Mercantile | <input checked="" type="checkbox"/> Industrial |
| <input checked="" type="checkbox"/> Dayton Power and Light | <input type="checkbox"/> Residential | <input checked="" type="checkbox"/> Commercial | <input checked="" type="checkbox"/> Mercantile | <input checked="" type="checkbox"/> Industrial |

- A-10 Provide the approximate start date that the applicant proposes to begin delivering services

July 15, 2015

PROVIDE THE FOLLOWING AS SEPARATE ATTACHMENTS AND LABEL AS INDICATED:

- A-11 **Exhibit A-11 "Principal Officers, Directors & Partners"** provide the names, titles, addresses and telephone numbers of the applicant's principal officers, directors, partners, or other similar officials.
- A-12 **Exhibit A-12 "Corporate Structure,"** provide a description of the applicant's corporate structure, including a graphical depiction of such structure, and a list of all affiliate and subsidiary companies that supply retail or wholesale electricity or natural gas to customers and companies that aggregate customers in North America.
- A-13 **Exhibit A-13 "Company History,"** provide a concise description of the applicant's company history and principal business interests.
- A-14 **Exhibit A-14 "Articles of Incorporation and Bylaws,"** if applicable, provide the articles of incorporation filed with the state or jurisdiction in which the Applicant is incorporated and any amendments thereto.
- A-15 **Exhibit A-15 "Secretary of State,"** provide evidence that the applicant has registered with the Ohio Secretary of the State.

B. APPLICANT MANAGERIAL CAPABILITY AND EXPERIENCE

PROVIDE THE FOLLOWING AS SEPARATE ATTACHMENTS AND LABEL AS INDICATED:

- B-1 **Exhibit B-1 "Jurisdictions of Operation,"** provide a list of all jurisdictions in which the applicant or any affiliated interest of the applicant is, at the date of filing the application, certified, licensed, registered, or otherwise authorized to provide retail or wholesale electric services including aggregation services.
- B-2 **Exhibit B-2 "Experience & Plans,"** provide a description of the applicant's experience and plan for contracting with customers, providing contracted services, providing billing statements, and responding to customer inquiries and complaints in accordance with Commission rules adopted pursuant to Section 4928.10 of the Revised Code.

B-3 **Exhibit B-3 "Summary of Experience,"** provide a concise summary of the applicant's experience in providing aggregation service(s) including contracting with customers to combine electric load and representing customers in the purchase of retail electric services. (e.g. number and types of customers served, utility service areas, amount of load, etc.).

B-4 **Exhibit B-4 "Disclosure of Liabilities and Investigations,"** provide a description of all existing, pending or past rulings, judgments, contingent liabilities, revocation of authority, regulatory investigations, or any other matter that could adversely impact the applicant's financial or operational status or ability to provide the services it is seeking to be certified to provide.

B-5 Disclose whether the applicant, a predecessor of the applicant, or any principal officer of the applicant have ever been convicted or held liable for fraud or for violation of any consumer protection or antitrust laws within the past five years.

☒ No ☐ Yes

If yes, provide a separate attachment labeled as **Exhibit B-5 "Disclosure of Consumer Protection Violations"** detailing such violation(s) and providing all relevant documents.

B-6 Disclose whether the applicant or a predecessor of the applicant has had any certification, license, or application to provide retail or wholesale electric service including aggregation service denied, curtailed, suspended, revoked, or cancelled within the past two years.

☒ No ☐ Yes

If yes, provide a separate attachment labeled as **Exhibit B-6 "Disclosure of Certification Denial, Curtailment, Suspension, or Revocation"** detailing such action(s) and providing all relevant documents.

C. APPLICANT FINANCIAL CAPABILITY AND EXPERIENCE

PROVIDE THE FOLLOWING AS SEPARATE ATTACHMENTS AND LABEL AS INDICATED:

C-1 **Exhibit C-1 "Annual Reports,"** provide the two most recent Annual Reports to Shareholders. If applicant does not have annual reports, the applicant should provide similar information in Exhibit C-1 or indicate that Exhibit C-1 is not applicable and why.

C-2 **Exhibit C-2 "SEC Filings,"** provide the most recent 10-K/8-K Filings with the SEC. If applicant does not have such filings, it may submit those of its parent company. If the applicant does not have such filings, then the applicant may indicate in Exhibit C-2 that the applicant is not required to file with the SEC and why.

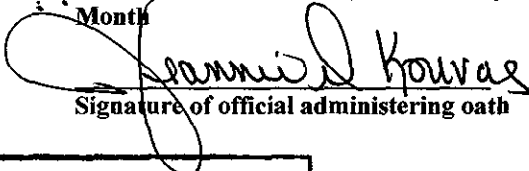
- C-3 **Exhibit C-3 "Financial Statements,"** provide copies of the applicant's two most recent years of audited financial statements (balance sheet, income statement, and cash flow statement). If audited financial statements are not available, provide officer certified financial statements. If the applicant has not been in business long enough to satisfy this requirement, it shall file audited or officer certified financial statements covering the life of the business.
- C-4 **Exhibit C-4 "Financial Arrangements,"** provide copies of the applicant's financial arrangements to conduct CRES as a business activity (e.g., guarantees, bank commitments, contractual arrangements, credit agreements, etc.,).
- C-5 **Exhibit C-5 "Forecasted Financial Statements,"** provide two years of forecasted financial statements (balance sheet, income statement, and cash flow statement) for the applicant's CRES operation, along with a list of assumptions, and the name, address, e-mail address, and telephone number of the preparer.
- C-6 **Exhibit C-6 "Credit Rating,"** provide a statement disclosing the applicant's credit rating as reported by two of the following organizations: Duff & Phelps, Dun and Bradstreet Information Services, Fitch IBCA, Moody's Investors Service, Standard & Poors, or a similar organization. In instances where an applicant does not have its own credit ratings, it may substitute the credit ratings of a parent or affiliate organization, provided the applicant submits a statement signed by a principal officer of the applicant's parent or affiliate organization that guarantees the obligations of the applicant.
- C-7 **Exhibit C-7 "Credit Report,"** provide a copy of the applicant's credit report from Experian, Dun and Bradstreet or a similar organization.
- C-8 **Exhibit C-8 "Bankruptcy Information,"** provide a list and description of any reorganizations, protection from creditors or any other form of bankruptcy filings made by the applicant, a parent or affiliate organization that guarantees the obligations of the applicant or any officer of the applicant in the current year or within the two most recent years preceding the application.

C-9 **Exhibit C-9 "Merger Information,"** provide a statement describing any dissolution or merger or acquisition of the applicant within the five most recent years preceding the application.

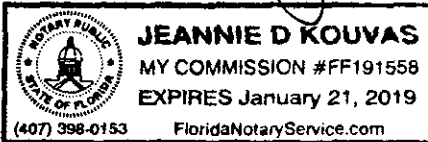

Signature of Applicant & Title

Albert James Mathers CEO/President

Sworn and subscribed before me this 25th day of June, 2015
Month Year


Signature of official administering oath

Jeannie D. Kouvas
Print Name and Title Sr. Vice President
Administration



My commission expires on January 21, 2019

AFFIDAVIT

State of FLORIDA _____:

(Town) SS.

County of PINELLAS _____:

ALBERT JAMES MATHERS, Affiant, being duly sworn/affirmed according to law, deposes and says that:
He/She is the CEO/PRESIDENT (Office of Affiant) of CUSTOMER ACQUISITION SPECIALISTS
OF AMERICA INC., dba NORTH AMERICAN ENERGY ADVISORY (Name of Applicant);

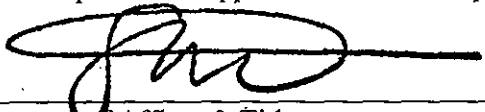
That he/she is authorized to and does make this affidavit for said Applicant,

1. The Applicant herein, attests under penalty of false statement that all statements made in the application for certification are true and complete and that it will amend its application while the application is pending if any substantial changes occur regarding the information provided in the application.
2. The Applicant herein, attests it will timely file an annual report with the Public Utilities Commission of Ohio of its intrastate gross receipts, gross earnings, and sales of kilowatt-hours of electricity pursuant to Division (A) of Section 4905.10, Division (A) of Section 4911.18, and Division (F) of Section 4928.06 of the Revised Code.
3. The Applicant herein, attests that it will timely pay any assessments made pursuant to Sections 4905.10, 4911.18, or Division F of Section 4928.06 of the Revised Code.
4. The Applicant herein, attests that it will comply with all Public Utilities Commission of Ohio rules or orders as adopted pursuant to Chapter 4928 of the Revised Code.
5. The Applicant herein, attests that it will cooperate fully with the Public Utilities Commission of Ohio, and its Staff on any utility matter including the investigation of any consumer complaint regarding any service offered or provided by the Applicant.
6. The Applicant herein, attests that it will fully comply with Section 4928.09 of the Revised Code regarding consent to the jurisdiction of Ohio Courts and the service of process.
7. The Applicant herein, attests that it will comply with all state and/or federal rules and regulations concerning consumer protection, the environment, and advertising/promotions.
8. The Applicant herein, attests that it will use its best efforts to verify that any entity with whom it has a contractual relationship to purchase power is in compliance with all applicable licensing requirements of the Federal Energy Regulatory Commission and the Public Utilities Commission of Ohio.
9. The Applicant herein, attests that it will cooperate fully with the Public Utilities Commission of Ohio, the electric distribution companies, the regional transmission entities, and other electric suppliers in the event of an emergency condition that may jeopardize the safety and reliability of the electric service in accordance with the emergency plans and other procedures as may be determined appropriate by the Commission
10. If applicable to the service(s) the Applicant will provide, the Applicant herein, attests that it will adhere to the reliability standards of (1) the North American Electric Reliability Council (NERC), (2) the appropriate regional reliability council(s), and (3) the Public Utilities Commission of Ohio. (Only applicable if pertains to the services the Applicant is offering)

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11. The Applicant herein, attests that it will inform the Commission of any material change to the information supplied in the application within 30 days of such material change, including any change in contact person for regulatory purposes or contact person for Staff use in investigating customer complaints.

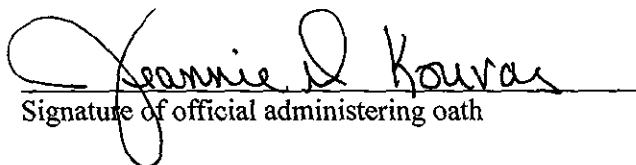
That the facts above set forth are true and correct to the best of his/her knowledge, information, and belief and that he/she expects said Applicant to be able to prove the same at any hearing hereof.



Albert James Mathers
CEO/PRESIDENT

Signature of Affiant & Title

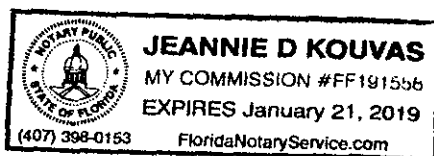
Sworn and subscribed before me this 25th day of June, 2015
Month Year



Signature of official administering oath

Jeannie D. Kouvas
Print Name and Title

My commission expires on January 21, 2019



A-11 Exhibit

"Principal Officers, Directors and Partners"

Provide the names, titles, addresses and telephone numbers of the Applicant's principal officers, directors, partners, or other similar officials.

Albert James Mathers, CEO/President (Director)

1315 Cleveland Street
Clearwater, Florida 33755
(727) 692-8871

FuMei Mathers, CFO -Chief Financial Officer (Director)

1315 Cleveland Street
Clearwater, Florida 33755
(727) 643-5398

EXECUTIVE STAFF

Mark Hoover – Sr. Vice President of Operations

Matt Helland- Sr. Vice President of Customer & Client Relations

Jeannie Mastorides – Sr. Vice President of Administration / Legal & Regulatory

TJ Leesley – Chief Marketing Officer

Colin Murphy – Chief Technology Officer

Ray Franklin – Sr. Commodity Analyst

Chris Griffin – Sr. Energy Analyst

Ollie Baldwin – VP of Quality Control

**1315 Cleveland Street
Clearwater, Florida 33755
800-920-4631**

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Customer Acquisition Specialists of America, Inc.
d.b.a. North American Energy Advisory

Exhibit A-12

"Corporate Structure,"

Provide a description of the Applicant's corporate structure, including a graphical depiction of such structure, and a list of all affiliate and subsidiary companies that supply retail or wholesale electricity or natural gas to customers and companies that aggregate customers in North America.

Customer Acquisition Specialists of America, Inc., has no affiliate or subsidiary companies.

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Customer Acquisition Specialists of America, Inc.
d.b.a. North American Energy Advisory

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.

North American Energy Advisory

1315 Cleveland Street
Clearwater, Florida 33755

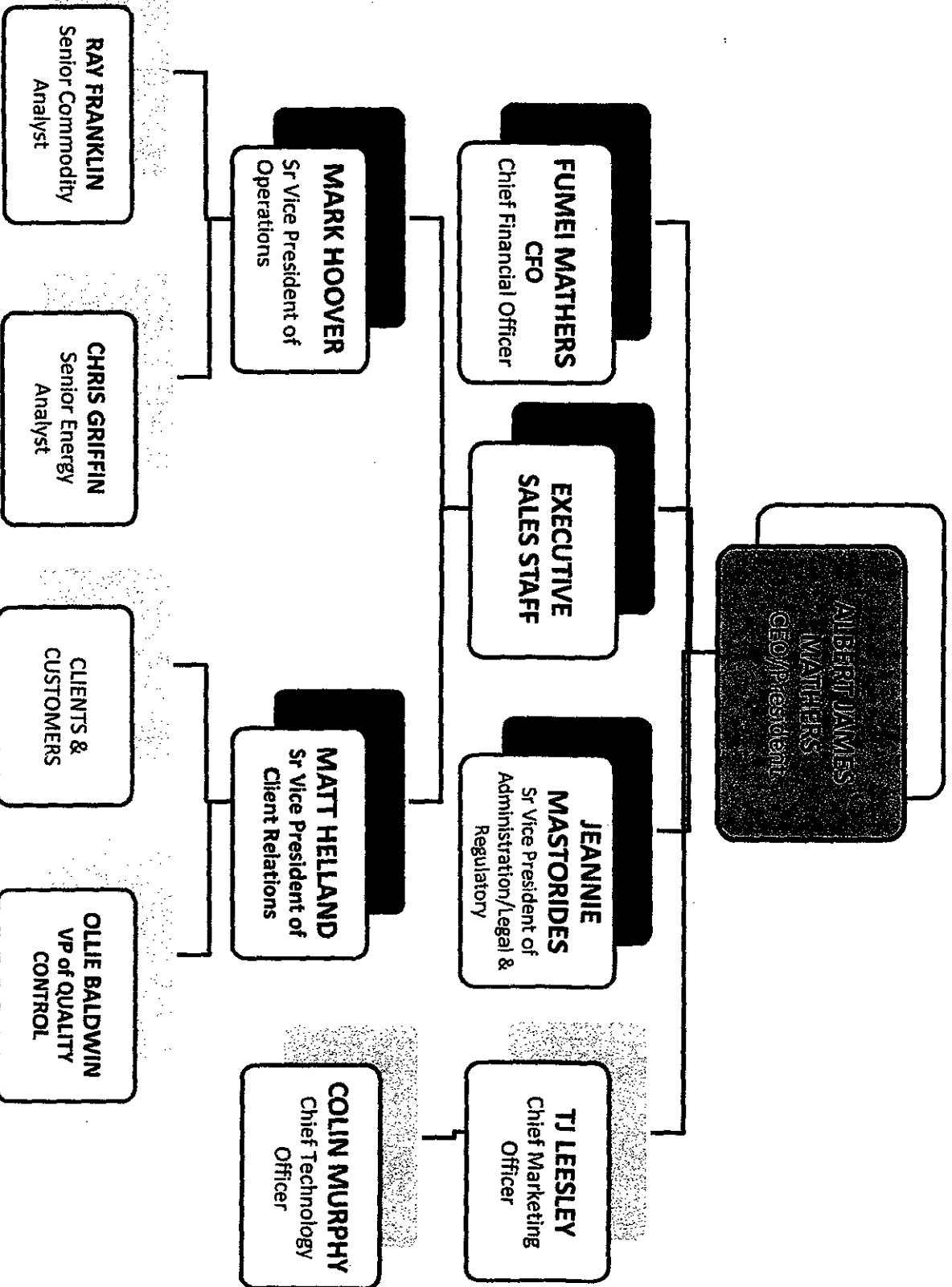


Exhibit A-13

"Company History"

Provide a concise description of the Applicant's company history and principal business interests.

OUR MISSION

Our mission is to be the most effective Brokering agent available to the energy marketing industry and to help the consumer manage their energy costs through effective energy purchasing strategies in small retail, commercial into and including industrial, large commercial and renewable energy resources as they become available.

OVERVIEW

Since 1999, CASA has acquired more than 2 million residential and commercial energy customers in Ohio Pennsylvania, New York, New Jersey, Illinois, Michigan, Kentucky, Texas, California, Connecticut, Florida, Maine, New Hampshire, Massachusetts, Ontario and Georgia.

CASA has operated in more than 30 major utilities, representing over 125 million customers

Exhibit A-14

"Articles of Incorporation and Bylaws"

If applicable, provide the articles of incorporation filed with the state or jurisdiction in which the Applicant is incorporated and any amendments thereto.

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Customer Acquisition Specialists of America, Inc.
d.b.a. North American Energy Advisory

CERTIFICATE DESIGNATING PLACE OF BUSINESS OR DOMICILE FOR THE SERVICE OF PROCESS WITHIN THIS STATE, NAMING AGENT UPON WHOM PROCESS MAY BE SERVED.

In pursuance of Chapter 48.091, Florida Statutes, the following is submitted, in compliance with said Act.

First--That CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC., desiring to organize under the laws of the State of Florida with its principal office, as indicated in the Articles of Incorporation at City of Clearwater, County of Pinellas, State of Florida, has named R. Carlton Ward located at 1253 Park Street, City of Clearwater, County of Pinellas, State of Florida, as its agent to accept service of process within this state.

ACKNOWLEDGMENT: (MUST BE SIGNED BY DESIGNATED AGENT)

Having been named to accept service of process for the above stated corporation, at place designated in this certificate, I hereby accept to act in this capacity, and agree to comply with the provision of said Act relative to keeping open said office.

By: 
R. CARLTON WARD, ESQ.
REGISTERED AGENT

FILED
99 SEP - 8 AM
SECRETARY OF STATE
TALLAHASSEE, FL

VIII.

INCORPORATOR

The name and address of the person signing these Articles is:

R. Carlton Ward, Esq.
1253 Park Street
Clearwater, Florida 33757

IX.

INDEMNIFICATION

The corporation shall indemnify any officer or director, of any former officer or director, to the full extent permitted by law.

X.

AMENDMENT

The corporation reserves the right to amend or repeal any provisions contained in these Articles of Incorporation, or any amendment hereto, and any right conferred upon the shareholders is subject to this reservation.

IN WITNESS WHEREOF, the undersigned subscriber has executed these Articles of Incorporation this 31st day of August, 1999.


R. Carlton Ward, Esquire

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deposited with the Secretary. In all cases of transfer, the former certificate must be surrendered up and cancelled before a new certificate is issued. No transfer shall be made upon the books of the Corporation within ten days next preceding the annual meeting of the shareholders.

Article VI.

DIVIDENDS

Sec. 1. WHEN DECLARED. The Board of Directors shall by vote declare dividends from the surplus profits of the Corporation whenever, in their opinion, the condition of the Corporation's affairs will render it expedient for such dividends to be declared.

Article VII.

BILLS, NOTES, ETC.

Sec. 1. HOW MADE. All bills payable, notes, checks or other negotiable instruments of the Corporation shall be made in the name of the Corporation, and shall be signed by such officers as may be designated by the Board of Directors from time to time. No officer or agent of the Corporation, either singularly or jointly with others, shall have the power to make any bill payable, note, checks, draft or warrant or other negotiable instrument, or endorse the same in the name of the Corporation, or contract or cause to be contracted any debt or liability in the name or in behalf of the Corporation, except as herein expressly prescribed and provided.

Article VIII.

AMENDMENTS

Sec. 1. HOW AMENDED. These Bylaws may be altered, amended, repealed or added to by an affirmative vote of the stockholders representing a majority of the whole capital stock, at an annual meeting or at a special meeting called for that purpose. If, however, all the stockholders shall be present at any regular or special meeting, these Bylaws may be amended by a unanimous vote, without any previous notice.

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**UNANIMOUS WRITTEN CONSENT OF INCORPORATOR AND DIRECTORS OF
CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
IN LIEU OF ORGANIZATIONAL MEETING**

Pursuant to Section 607.0205, Florida Statutes, the undersigned being the incorporator and all the directors of CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC., a Florida corporation ("the Corporation"), hereby takes the following action in lieu of holding a meeting:

1. The following persons, whose addresses are designated opposite his or her name, are elected to serve as directors of the corporation until the next annual meeting of shareholders and his or her successors is elected and qualified or until his or her earlier resignation, removal, or death:

<u>Name</u>	<u>Address</u>
Patrick J. Clouden	11596-94th Street North Largo, Florida 33773

2. The Articles of Incorporation of the Corporation as filed by the Florida Department of State are hereby approved, ratified, and confirmed in every respect and shall be filed in the Corporation's book.

3. The Bylaws attached hereto are adopted as the Bylaws of the Corporation.

4. Each of the following persons is elected to serve in the office of the Corporation designated opposite his or her name until the next annual meeting of directors and his or her successor is elected and qualified or until his or her earlier resignation, removal from office, or death:

<u>Name</u>	<u>Office</u>
Patrick J. Clouden	President
Patrick J. Clouden	Secretary
Patrick J. Clouden	Treasurer

5. The seal impressed on the margin of this page is adopted as the official seal of the Corporation.

6. The form of stock certificate attached to this Written Consent and marked "Specimen" is approved for use in issuing stock in the Corporation.

7. It is deemed advisable by the Board of Directors that this Corporation offer for sale and issue 100 shares of the common stock authorized by its Articles of Incorporation to Patrick J. Clouden.

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It is further deemed advisable that the offer, sale and issue of such shares be effectuated in such manner that qualified stockholders may receive the benefits of Section 1244 of the Internal Revenue Code; and

It is RESOLVED that this Corporation adopt the following plan for the sale of its stock and that the President of this Corporation, and such other officers as he may designate, be, and they are hereby authorized and directed to offer for sale and to sell and issue up to 7,500 shares of the Common Stock of this Corporation, in the total dollar amount of not more than \$999,000.00, in cash or other property.

There is not now outstanding any offering, or portion thereof, of this Corporation to sell or issue any of its stock, and

This Corporation is a small business corporation as defined in Section 1244(c)(3) of the Internal Revenue Code; and

8. The President of the Corporation is authorized to designate from time to time depositories for the Corporation's use. The President and Treasurer of the Corporation are authorized to sign on the Corporation's account at any such depositories. The officers of the Corporation are authorized to execute and deliver the necessary bank resolution forms.

9. The Secretary of the Corporation shall procure the books of account and other books necessary or appropriate for carrying on the Corporation's business.

10. The Corporation authorizes the payment or reimbursement of all charges and expenditures incident to or arising out of the organization of the Corporation and elects to amortize over a 60-month period all of such expenses which may be amortized under Section 248 of the Internal Revenue Code of 1986, as amended.

Dated this 29 day of October, 1999.


DIRECTOR'S SIGNATURE


Patrick J. Clouden

DATE OF SIGNATURE

10/16/99

INCORPORATOR:


R. Carlton Ward

DATE OF SIGNATURE

10/29/99

**UNANIMOUS WRITTEN CONSENT OF INCORPORATOR AND DIRECTORS OF
CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
IN LIEU OF ORGANIZATIONAL MEETING**

Pursuant to Section 607.0205, Florida Statutes, the undersigned being the incorporator and all the directors of CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC., a Florida corporation ("the Corporation"), hereby takes the following action in lieu of holding a meeting:

1. The following persons, whose addresses are designated opposite his or her name, are elected to serve as directors of the corporation until the next annual meeting of shareholders and his or her successors is elected and qualified or until his or her earlier resignation, removal, or death:

<u>Name</u>	<u>Address</u>
Patrick J. Clouden	11596-94th Street North Largo, Florida 33773

2. The Articles of Incorporation of the Corporation as filed by the Florida Department of State are hereby approved, ratified, and confirmed in every respect and shall be filed in the Corporation's book.

3. The Bylaws attached hereto are adopted as the Bylaws of the Corporation.

4. Each of the following persons is elected to serve in the office of the Corporation designated opposite his or her name until the next annual meeting of directors and his or her successor is elected and qualified or until his or her earlier resignation, removal from office, or death:

<u>Name</u>	<u>Office</u>
Patrick J. Clouden	President
Patrick J. Clouden	Secretary
Patrick J. Clouden	Treasurer

5. The seal impressed on the margin of this page is adopted as the official seal of the Corporation.

6. The form of stock certificate attached to this Written Consent and marked "Specimen" is approved for use in issuing stock in the Corporation.

7. It is deemed advisable by the Board of Directors that this Corporation offer for sale and issue 100 shares of the common stock authorized by its Articles of Incorporation to Patrick J. Clouden.

20/69

It is further deemed advisable that the offer, sale and issue of such shares be effectuated in such manner that qualified stockholders may receive the benefits of Section 1244 of the Internal Revenue Code; and

It is RESOLVED that this Corporation adopt the following plan for the sale of its stock and that the President of this corporation, and such other officers as he may designate, be, and they are hereby authorized and directed to offer for sale and to sell and issue up to 7,500 shares of the Common Stock of this Corporation, in the total dollar amount of not more than \$999,000.00, in cash or other property.

There is not now outstanding any offering, or portion thereof, of this Corporation to sell or issue any of its stock; and

This Corporation is a small business corporation as defined in Section 1244(c) (3) of the Internal Revenue Code; and

8. The President of the Corporation is authorized to designate from time to time depositories for the corporation's use. The President and Treasurer of the Corporation are authorized to sign on the Corporation's account at any such depositories. The officers of the Corporation are authorized to execute and deliver the necessary bank resolution forms.

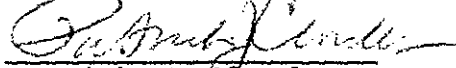
9. The Secretary of the Corporation shall procure the books of account and other books necessary or appropriate for carrying on the Corporation's business.

10. The Corporation authorizes the payment or reimbursement of all charges and expenditures incident to or arising out of the organization of the Corporation and elects to amortize over a 60-month period all of such expenses which may be amortized under Section 248 of the Internal Revenue Code of 1986, as amended.

11. The Corporation elects to have a fiscal year beginning November 1 and ending October 31.

Dated this 29th day of October, 1999.


DIRECTOR'S SIGNATURE


Patrick J. Clouden

DATE OF SIGNATURE

Oct 29, 1999

INCORPORATOR:


R. Carlton Ward

DATE OF SIGNATURE

October 29, 1999

RESIGNATION FROM BOARD OF DIRECTORS
AND
RESIGNATION AS AN OFFICER

The undersigned, Patrick J. Clouden, hereby resigns as an officer and director of CUSTOMER ACQUISITION SPECIALIST OF AMERICA, INC., a Florida corporation, this 1st day of July, 2014.



PATRICK J. CLOUDEN

FILED

NOV -7 AM 9:15

CLERK OF DISTRICT COURT
JACKSONVILLE, FLORIDA


H14000259095 3

22/69

**ACTION OF DIRECTORS IN LIEU OF MEETING
CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.**

The undersigned being all the Directors of CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC., a Florida corporation ("Corporation"), do hereby take the following action in lieu of a meeting this 1 day of July, 2014, Section 607.0821, Florida Statutes.

1. James Mathers is hereby elected as President, Secretary and Treasure or until his death or his successor is elected and qualified.


JAMES MATHERS

P 99000081388

11/07/2014 15:38 FAX 7274478830

Richard Gilkey

11/07/2014/0003

Division of Corporations

Page 1 of 1

Florida Department of State
Division of Corporations
Electronic Filing Cover Sheet

Note: Please print this page and use it as a cover sheet. Type the fax audit number (shown below) on the top and bottom of all pages of the document.

(((H14000259095 3)))



H140002590953ABC2

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To:

Division of Corporations
Fax Number : (850) 617-6380

From:

Account Name : RICHARDS, GILKEY, FITE, SLAUGHTER, PRATESI & WARD, P.A.
Account Number : 075350000244
Phone : (727) 443-3281
Fax Number : (727) 447-8830

Enter the email address for this business entity to be used for future annual report mailings. Enter only one email address please.

Email Address: cward@richardsgilkey.com

COR AMND/RESTATE/CORRECT OR O/D RESIGN
CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.

Certificate of Status	0
Certified Copy	0
Page Count	01
Estimated Charge	\$35.00

NOV 10 2014

R. WHITE

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TALLAHASSEE, FLORIDA

14 NOV -7 AM 9:15

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FLORIDA DEPARTMENT OF STATE
DIVISION OF CORPORATIONS
TALLAHASSEE, FLORIDA

<https://efile.sunbiz.org/scripts/efilcovr.exe>

24/69

11/6/2014

Exhibit A-15

"Secretary of State,"

Provide evidence that the Applicant has registered with the Ohio Secretary of the State.

- State of Ohio Certificate – 2321981 – Customer Acquisition Specialists of America, Inc.
Foreign License Doc# 201423901182 / Effective Date 08/25/2014
- State of Ohio Certificate – 2398858 – North American Energy Advisory
Trade Name Registration Doc # 201514801049 / Effective Date 05/28/2015
- State of Florida – Customer Acquisition Specialists of America, Inc.
Certificate of Good Standing – June 2015
Corporation Organized September 8, 1999 / Doc # P99000081385
- Customer Acquisition Specialists of America, Inc. - State of Florida Detail Data page
- North American Energy Advisory – State of Florida Data page & Fictitious Name Filing.

25/69

Customer Acquisition Specialists of America, Inc.
d.b.a. North American Energy Advisory

Receipt

This is not a bill. Please do not remit payment.

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
ATTN: EVE WITTER, REG DIRECTOR
601 CLEVELAND ST, STE 320
CLEARWATER, FL 33755

**STATE OF OHIO
CERTIFICATE**

Ohio Secretary of State, Jon Husted
2321981

It is hereby certified that the Secretary of State of Ohio has custody of the business records for
CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.

and, that said business records show the filing and recording of:

Document(s)

FOREIGN LICENSE/FOR-PROFIT

Effective Date: 08/25/2014

Document No(s):

201423901182

Authorization to transact business in Ohio is hereby given, until surrender, expiration or cancellation of this license.



United States of America
State of Ohio
Office of the Secretary of State

Witness my hand and the seal of the
Secretary of State at Columbus, Ohio this
28th day of August, A.D. 2014.

Jon Husted
Ohio Secretary of State



DATE	DOCUMENT ID	DESCRIPTION	FILING	EXPED	PENALTY	CERT	COPY
06/04/2015	201514801049	TRADE NAME REGISTRATION (RNO)	50.00	0.00	0.00	0.00	0.00

Receipt

This is not a bill. Please do not remit payment.

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
1315 CLEVELAND STREET
CLEARWATER, OH 33755

STATE OF OHIO CERTIFICATE

Ohio Secretary of State, Jon Husted
2398858

It is hereby certified that the Secretary of State of Ohio has custody of the business records for

NORTH AMERICAN ENERGY ADVISORY

and, that said business records show the filing and recording of:

Document(s)

TRADE NAME REGISTRATION

Effective Date: 05/28/2015

Document No(s):

201514801049

Date of First Use: 03/02/2015

Expiration Date: 05/28/2020

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
1315 CLEVELAND STREET
CLEARWATER, FL 33755



United States of America
State of Ohio
Office of the Secretary of State

Witness my hand and the seal of the
Secretary of State at Columbus, Ohio this
4th day of June, A.D. 2015.

Jon Husted

Ohio Secretary of State

27/69



JON HUSTED
OHIO SECRETARY OF STATE

180 East Broad Street, Suite 103 (ground floor) • Columbus, Ohio 43215
Toll Free: (877) SOS-FILE (767-3453) Central Ohio: (614) 466-3910
www.OhioSecretaryofState.gov • busserv@OhioSecretaryofState.gov

Invoice No: 3000146424

Invoice Date: 05/28/2015 02:05:02 PM

Billing Information:

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
1315 CLEVELAND STREET
CLEARWATER, OH 33755

Filing Name	Document Id	Charter Number	Business Name	Amount
Trade Name Registration	201514801049	2398858	NORTH AMERICAN ENERGY ADVISORY	\$50.00

Payment Type: Credit Card Payment

Invoice Total: \$50.00

28/69

State of Florida

Department of State

I certify from the records of this office that CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC. is a corporation organized under the laws of the State of Florida, filed on September 8, 1999.

The document number of this corporation is P99000081385.

I further certify that said corporation has paid all fees due this office through December 31, 2015, that its most recent annual report/uniform business report was filed on March 18, 2015, and that its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Nineteenth day of June, 2015*



Ken Detzner
Secretary of State

Tracking Number: CU6529597908

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

29/69

FLORIDA DEPARTMENT OF STATE
DIVISION OF CORPORATIONS**Detail by Entity Name****Florida Profit Corporation**

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.

Filing Information

Document Number	P99000081385
FEI/EIN Number	593600275
Date Filed	09/08/1999
State	FL
Status	ACTIVE
Last Event	REINSTATEMENT
Event Date Filed	03/02/2001

Principal Address1315 CLEVELAND STREET
CLEARWATER, FL 33755

Changed: 03/18/2015

Mailing AddressP.O. BOX 2574
CLEARWATER, FL 33757

Changed: 03/18/2015

Registered Agent Name & AddressWARD, R. CARLTON
1253 PARK ST.
CLEARWATER, FL 33756

Address Changed: 03/02/2001

Officer/Director Detail**Name & Address**

Title .PRES, Secretary, President

MATHERS, JIM
8 EVONAIRE CIRCLE
CLEARWATER, FL 33756**Annual Reports**

30/69

Report Year	Filed Date
2013	03/27/2013
2014	03/31/2014
2015	03/18/2015

Document Images

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State of Florida, Department of State

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FLORIDA DEPARTMENT OF STATE
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[Submit](#)**Fictitious Name Detail****Fictitious Name**

NORTH AMERICAN ENERGY ADVISORY

Filing Information**Registration Number** G14000127446**Status** ACTIVE**Filed Date** 12/18/2014**Expiration Date** 12/31/2019**Current Owners** 1**County** MULTIPLE**Total Pages** 1**Events Filed** NONE**FEI/EIN Number** NONE**Mailing Address**8 EVONAIRE CIRCLE
BELLEAIR, FL 33756**Owner Information**

CUSTOMER AQUISITION SPECIALISTS OF AMERICA, INC.

8 EVONAIRE CIRCLE

BELLEAIR, FL 33756

FEI/EIN Number: 59-3600275**Document Number:** P99000081385**Document Images**[12/18/2014 -- Fictitious Name Filing](#)[View image in PDF format](#)[Previous on List](#)[Next on List](#)[Return to List](#)[Fictitious Name Search](#)

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APPLICATION FOR REGISTRATION OF FICTITIOUS NAME

REGISTRATION# G14000127446

Fictitious Name to be Registered: NORTH AMERICAN ENERGY ADVISORY

Mailing Address of Business: 8 EVONAIRE CIRCLE
BELLEAIR, FL 33756

Florida County of Principal Place of Business: MULTIPLE

FEI Number:

FILED
Dec 18, 2014
Secretary of State

Owner(s) of Fictitious Name:

CUSTOMER AQUISITION SPECIALISTS OF AMERICA, INC.
8 EVONAIRE CIRCLE
BELLEAIR, FL 33756 US
Florida Document Number: P99000081385
FEI Number: 59-3600275

I the undersigned, being an owner in the above fictitious name, certify that the information indicated on this form is true and accurate. I further certify that the fictitious name to be registered has been advertised at least once in a newspaper as defined in Chapter 50, Florida Statutes, in the county where the principal place of business is located. I understand that the electronic signature below shall have the same legal effect as if made under oath and I am aware that false information submitted in a document to the Department of State constitutes a third degree felony as provided for in s. 817.155, Florida Statutes.

ALBERT MATHERS

12/18/2014

Electronic Signature(s)

Date

Certificate of Status Requested ()

Certified Copy Requested ()

33/69

APPLICANT MANAGERIAL CAPABILITY AND EXPERIENCE

34/69

Customer Acquisition Specialists of America, Inc.
d.b.a. North American Energy Advisory

Exhibit B-1

“Jurisdictions of Operation,”

Provide a list of all jurisdictions in which the Applicant or any affiliated interest of the Applicant is, at the date of filing the application, certified, licensed, registered, or otherwise authorized to provide retail or wholesale electric services including aggregation services.

35/69

CUSTOMER ACQUISITION SPECIALIST OF AMERICA INC / NORTH AMERICAN ENERGY ADVISORY

STATE	SECRETARY OF STATE REGISTRATION	DATE	BROKER LICENSE/REGISTRATION	LICENSE/REGISTRATION NUMBER	EFFECTIVE DATE
FLORIDA	P9900001385 BUSINESS ID# 115493 CERTIF OF AUTH #2014-204138-001 / Filing ID 5185961	09.08.1999	TELEMARKETER LICENSE	TC-2957	09.22.14
CONNECTICUT	FILE #5570634 ON 09.12.14 REQUEST #141166367 AUTHENTICATION # 1694477	10.24.2014	BROKER LICENSE not required	X	
DELAWARE	FILE # C00004984163	09.12.14	ELECTRIC SUPPLIER CERTIFICATE	PSC Docket # 14-0241 - Order # 8674	12.04.14
DISTRICT OF COLUMBIA - Elec	FILE # C00004984163	06.27.14		PENDING Case# EA 2014-16	
DISTRICT of COLUMBIA - Gas	" " "	"		PENDING Case# EA 2014-16	
ILLINOIS	FILE # 6974-858-9	09.17.2014	ENERGY BROKER CONSULTANT LICENSE	14-0462	10.07.14
MAINE - Elec	FILE# 20150076 F / DCN 2142122300031	07.31.14	ELECTRIC BROKER LICENSE	2014-00226	08.14.14
MAINE - Gas	" " "	"	GAS LICENSE not required - REGISTERED WITH STATE	99-334	08.14.14
MARYLAND - Elec	R 9171975	10.10.14	ELECTRIC BROKER LICENSE	IR-33-65	12.03.14
MARYLAND - Gas	" " "	"	NATURAL GAS BROKER LICENSE	IR-33-66	12.03.14
MASSACHUSETTS - Elec	CERTIFICATE # 14109704410	10.02.14	ELECTRIC BROKER LICENSE	EB-308	02.19.15
MASSACHUSETTS - Gas	" " "	"	NATURAL GAS BROKER LICENSE	RA-124	11.13.14
MICHIGAN	60741-J (19861498-1)	09.26.14	BROKER LICENSE not required	X	
NEW HAMPSHIRE - Elec	Registration # not provided	09.19.14	ELECTRIC BROKER LICENSE	DM 14-192	10.06.14
NEW HAMPSHIRE - Gas	Registration # not provided	"	NATURAL GAS BROKER LICENSE	DM 14-193	10.06.14
NEW JERSEY - Elec	100982853	08.03.07	STATE ENERGY CONSULTING LICENSE	EC-0099	02.11.15
NEW JERSEY - Gas	" " "	"	STATE ENERGY AGENT LICENSE	EA-0313	02.11.15
NEW YORK	DOS ID# 4616830	08.05.14	TELEMARKETER LICENSE	Control #693764 / 14273-17	09.22.14
OHIO - Elec	CASA Cert Lic ID 2321981 / DOC # 201423901182	08.25.14	ELECTRIC BROKER LICENSE	PENDING	
OHIO - Gas	Trade Name Reg Effec 05.28.2015 ID# 2398858 Doc#201514801049 First use 03.02.15 Exp 05/28/2020	"	NATURAL GAS BROKER LICENSE	PENDING	
PENNSYLVANIA - Elec	BUSINESS ENTITY # 3896886	07.30.09	ELECTRIC BROKER LICENSE	A-2009-2132064/Renewal 001848	01.14.10
PENNSYLVANIA - Gas	" " "	"	NATURAL GAS BROKER LICENSE	PENDING	
RHODE ISLAND - Elec	CERTIFICATION # 14100081360	07.17.14	ELECTRIC BROKER LICENSE	D 96-6 (Y6)	10.03.14
RHODE ISLAND - Gas	" " "	"	NATURAL GAS BROKER LICENSE	D 2379 (J3)	11.14.14
TEXAS	FILE # 802081632	10.08.14	BROKER LICENSE not required	X	

6/2/20

Exhibit B-2

"Experience & Plans,"

Provide a description of the Applicant's experience and plan for contracting with customers, providing contracted services, providing billing statements, and responding to customer inquiries and complaints in accordance with Commission rules adopted pursuant to Section 4928.10 of the Revised Code.

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC., ("CASA") established in 2001 and in conjunction with its then sister company Consumer Energy Solutions, Inc., has a successful 14 year track record in the industry as an agent for Supplies and as a Broker/Marketer licensed in and serving the Energy Supplier Markets in Pennsylvania, Maryland, Maine, New Hampshire, Rhode Island, new Jersey, Massachusetts, Connecticut, Ohio Illinois and Texas.

Neither CASA, nor any of its affiliated interests have been denied approval by a Stat Commission to sell electricity to Retail Electric Consumers or has had its authority revoked in the Gas and Electric markets it serves.

Customer Acquisition Specialists of America, Inc. has established the successful patterns necessary in the industry to monitor and control the entire business life cycle and the quality of its outreach to fulfill its duties in servicing the Suppliers and in keeping with the industry's Stat Regulatory Rules and important issues in the following ways:

1. CASA maintains a Customer Service Department dedicated to quickly resolve any customer questions or complaints that may occur with its own dedicated call lines and customer service representatives.
2. Company disciplinary procedures and implementation of those procedures are also keyed to the industry and designed from the view of complete professionalism on the part of every company employee.
3. CASA's operating procedures comply to regulations through recorded calls, and through routine and daily call monitoring from its Quality Control Department, in maintaining an assurance of Supplier related and industry standards in its marketing activities.
4. In addition to the above, CASA has used a third party verification company to verify all its offers and acceptances of offers from the customer who wish to take advantage of the energy programs they are informed of. The verification service employs recorded verification procedures which are then proved to CASA for its obligations in record keeping management of all marketing calls.
5. CASA maintains an advanced IT Department to enable it to effectively reach, monitor and maintain its internal record keeping obligations, as well as customer designed programs to monitor and track all aspects of the business life cycle involved.
6. Lastly CASA retains a dedicated Corporate Regulatory Assistant, who in liaison with the company Attorney, monitors, tracks and keeps its licensing and other obligations as an industry supplier current in each of the states it operates in, as well as assists and coordinated with company Executives and Managers regarding the internal procedures to track and ensure correct handling of marketing related regulations and rules applicable to such items as Do Not Call lists, Slamming prohibitions and any other items related to regulations and offers, as the various individual programs offers from suppliers are implemented and presented to the consumer.

Exhibit B-3

"Summary of Experience,"

Provide a concise summary of the applicant's experience in providing aggregation service(s) including contracting with customers to combine electric load and representing customers in the purchase of retail electric services. (E.g. number and types of customers served, utility service areas, amount of load, etc.).

Customer Acquisition Specialists of America Inc., dba North American Energy Advisory is an Energy Broker/Marketer, therefore does not provide aggregation services.

38/69

Exhibit B-4

"Disclosure of Liabilities and Investigations,"

Provide a description of all existing, pending or past rulings, judgments, contingent liabilities, revocation of authority, regulatory investigations, or any other matter that could adversely impact the Applicant's financial or operational status or ability to provide the services it is seeking to be certified to provide.

There are no existing, pending or past rulings, judgments, contingent liabilities, revocations, of authority, regulatory investigations or any other matter that could adversely impact the Applicant, CASA Inc., financial or operational status or ability to provide the services it is seeking to be certified to provide.

39/69

Exhibit B-5
Disclosure of Consumer Protection Violations

Disclose whether the applicant, a predecessor of the applicant, or any principal officer of the applicant have ever been convicted or held liable for fraud or for violation of any consumer protection or antitrust laws within the past five years.

X No ☐ Yes

40/69

Exhibit B-6
Disclosure of Certification Denial, Curtailment, Suspension, or Revocation

Disclose whether the applicant or a predecessor of the applicant has had any certification, license, or application to provide retail or wholesale electric service including aggregation service denied, curtailed, suspended, revoked, or cancelled within the past two years.

☒ No ☐ Yes

41/69

APPLICANT FINANCIAL CAPABILITY AND EXPERIENCE
PROVIDE THE FOLLOWING AS SEPARATE ATTACHMENTS AND LABEL AS INDICATED:

42/69

Customer Acquisition Specialists of America, Inc.
d.b.a. North American Energy Advisory

Exhibit C-1

“Annual Reports,”

Provide the two most recent Annual Reports to Shareholders. If Applicant does not have annual reports, the Applicant should provide similar information in Exhibit C-1 or indicate that Exhibit C-1 is not applicable and why.

**CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
d.b.a., NORTH AMERICAN ENERGY ADVISORY**

Exhibit C-1

Annual reports to shareholders

Not applicable - the company is privately held

Exhibit C-2

“SEC Filings,”

Provide the most recent 10-K/8-K Filings with the SEC. If Applicant does not have such filings, it may submit those of its parent company. If the Applicant does not have such filings, then the Applicant may indicate in Exhibit C-2 that the Applicant is not required to file with the SEC and why.

45/69

**CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
d.b.a., NORTH AMERICAN ENERGY ADVISORY**

Exhibit C-2

10-K/8-K filings

Not applicable - the company is privately held

46/69

Exhibit C-3

“Financial Statements,”

Provide copies of the Applicant's two most recent years of audited financial statements (balance sheet, income statement, and cash flow statement). If audited financial statements are not available, provide officer certified financial statements. If the Applicant has not been in business long enough to satisfy this requirement, it shall file audited or officer certified financial statements covering the life of the business.

47/69

Customer Acquisition Specialists of America, Inc.
d.b.a. North American Energy Advisory

**CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
d.b.a., NORTH AMERICAN ENERGY ADVISORY**

Exhibit C-3

FINANCIAL STATEMENTS

And

ACCOUNTANT'S COMPILATION REPORT

Year ended October 31, 2014
Year ended October 31, 2013

**CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
d.b.a., NORTH AMERICAN ENERGY ADVISORY**

FINANCIAL STATEMENTS

And

ACCOUNTANT'S COMPILATION REPORT

Year ended October 31, 2013

49/69

Henson & Company, CPA's, Inc.
2045 Huntington Drive, Suite B
South Pasadena, CA 91030

Accountant's Compilation Report

To the Board of Directors
Consumer Energy Solutions, Inc.

We have compiled the accompanying financial statements of Customer Acquisition Specialists of America, Inc (a Florida corporation), as of October 31, 2013 in accordance with Statements on Standards for Accounting and Review Services issued by the American Institute of Certified Public Accountants.

A compilation is limited to presenting in the form of financial statements, information that is the representation of the Company's management. We have not audited the accompanying financial statements and accordingly do not express an opinion or any other form of assurance on them.

Management has elected to omit substantially all of the disclosures and the statement of cash flows required by generally accepted accounting principles in the United States. If the omitted disclosures were included in the financial statement they might influence the user's conclusions about the companies' financial position, changes in member's equity and cash flows. Accordingly, these financial statements are not designed for those who are not informed about such matters.

A handwritten signature in black ink, appearing to read "Henson & Company", with a stylized flourish at the end.

South Pasadena, California
May 28, 2015

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
BALANCE SHEET
October 31, 2013

ASSETS

Cash	\$ 2,658
Accounts receivable	142,877
Loans to shareholders	<u>4,033,794</u>
Total current assets	<u>4,179,330</u>
Total assets	<u>\$ 4,179,330</u>

LIABILITIES AND SHAREHOLDERS' EQUITY

Current liabilities:	
Deferred revenue	\$ 3,864,896
Revolving line of credit	<u>294,493</u>
Total current liabilities	4,159,389
Shareholders' equity:	
Common stock, no par value, 1,000 shares authorized, issued, and outstanding	1,000
Accumulated deficit	<u>18,941</u>
Total shareholders' equity	<u>19,941</u>
Total liabilities and shareholders' equity	<u>\$ 4,179,330</u>

See accountant's compilation report

5/69

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
STATEMENT OF INCOME AND RETAINED EARNINGS
October 31, 2013

Revenues:

Sales \$ 6,170,817

Cost of sales – Sub-contracted staffing service 4,756,815

Gross profit 1,414,002

Operating expenses:

Accounting fees 64,900

Bank charges 6,828

Interest 31,930

Legal and professional fees 272,014

Office expenses 6,269

Taxes and license, net 150

Officer compensation 111,708

Total operating expenses 493,799

Operating income 920,203

Interest income 105,910

Net income 1,026,113

Shareholder distributions (1,007,172)

Retained earnings – beginning of year -

Retained earnings – end of year \$ 18,941

See accountant's compilation report

52/69

**CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
d.b.a., NORTH AMERICAN ENERGY ADVISORY**

FINANCIAL STATEMENTS

And

ACCOUNTANT'S COMPILATION REPORT

Year ended October 31, 2014

Henson & Company, CPA's, Inc.
2045 Huntington Drive, Suite B
South Pasadena, CA 91030

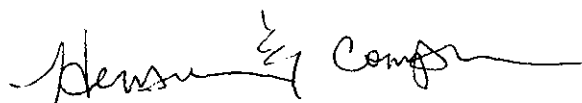
Accountant's compilation report

To the Board of Directors
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A handwritten signature in black ink that reads "Henson & Company". The signature is stylized and cursive, with a long horizontal line extending to the right.

South Pasadena, California
May 28, 2015

54/69

CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
BALANCE SHEET
October 31, 2014

ASSETS

Cash	\$ 2,658
Accounts receivable	142,877
Loans to shareholders	<u>4,033,794</u>
Total current assets	<u>4,179,330</u>
 Total assets	 <u>\$ 4,179,330</u>

LIABILITIES AND SHAREHOLDERS' EQUITY

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Deferred revenue	\$ 3,864,896
Revolving line of credit	<u>294,493</u>
Total current liabilities	4,159,389
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Common stock, no par value, 1,000 shares authorized, issued, and outstanding	1,000
Accumulated deficit	<u>18,941</u>
 Total shareholders' equity	 <u>19,941</u>
 Total liabilities and shareholders' equity	 <u>\$ 4,179,330</u>

See accountant's compilation report

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CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
STATEMENT OF INCOME AND RETAINED EARNINGS
October 31, 2014

Revenues:

Sales \$ 5,554,065

Cost of sales 3,705,801

Gross profit 1,848,264

Operating expenses:

Accounting fees

Office salaries 612,648

Bank charges 3,210

Interest 15,908

Legal and professional fees 14,595

Office expenses 45,035

Taxes and license, net 26,648

Officer compensation 73,770

Total operating expenses 791,814

Operating income 1,056,450

Interest income 60,058

Net income 1,116,508

Shareholder distributions (1,116,508)

Retained earnings – beginning of year -

Retained earnings – end of year \$ -

See accountant's compilation report

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Exhibit C-4

“Financial Arrangements,”

Provide copies of the Applicant's financial arrangements to conduct CRES as a business activity (e.g., guarantees, bank commitments, contractual arrangements, credit agreements, etc.).

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Exhibit C-5

“Forecasted Financial Statements,”

Provide two years of forecasted financial statements (balance sheet, income statement, and cash flow statement) for the Applicant's CRES operation, along with a list of assumptions, and the name, address, email address, and telephone number of the preparer.

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**CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
d.b.a., NORTH AMERICAN ENERGY ADVISORY**

Exhibit C-5

Forecasted financial statements

**Customer Acquisition Specialists of America, Inc. dba North American
Energy Advisory
C-5 Forecasted Financial Statements**

Ohio Electric Sales

	2015	2016
Total Revenues	\$ 225,000	\$ 275,000
Operating Expenses	\$ 115,000	\$ 130,000
Net Income	\$ 110,000	\$ 144,000

Should you have any questions or comments, please contact me at the number below.

Prepared by:
Stephen Henson, CPA
Henson & Company, CPA's

2045 Huntington Drive, Suite B
South Pasadena, CA 91030
(626) 403.4410

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Customer Acquisition Specialists of America, Inc.

C-5 Forecasted Financial Statements

Exhibit C-5 provides two years of forecasted income for the applicant's CRNGS operation, along with the contact information of the preparer.

Ohio Gas Sales

	2015	2016
Total Revenues	\$ 85,000	\$ 108,000
Operating Expenses	\$ 52,570	\$ 68,000
Net Income	\$ 32,430	\$ 40,000

Should you have any questions or comments, please contact me at the number below.

Prepared by:
Stephen Henson, CPA
Henson & Company, CPA's

2045 Huntington Drive, Suite B
South Pasadena, CA 91030
(626) 403.4410

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**CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
d.b.a., NORTH AMERICAN ENERGY ADVISORY**

Exhibit C-6

Credit rating

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Exhibit C-6

“Credit Rating,”

Provide a statement disclosing the applicant's credit rating as reported by two of the following organizations: Duff & Phelps, Dun and Bradstreet Information Services, Fitch IBCA, Moody's Investors Service, Standard & Poors, or a similar organization. In instances where an applicant does not have its own credit ratings, it may substitute the credit ratings of a parent or affiliate organization, provided the applicant submits a statement signed by a principal officer of the applicant's parent or affiliate organization that guarantees the obligations of the applicant.

Not applicable - the company is privately held that provides Brokerage Services without taking title to the natural gas and/or electricity

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CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
d.b.a., NORTH AMERICAN ENERGY ADVISORY

Exhibit C-7

Credit report

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Exhibit C-7

"Credit Report,"

Provide a copy of the applicant's credit report from Experian, Dun and Bradstreet or a similar organization.

Not applicable - the company is privately held that provides Brokerage Services without taking title to the natural gas and/or electricity

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Exhibit C-8

"Bankruptcy Information,"

Provide a list and description of any reorganizations, protection from creditors or any other form of bankruptcy filings made by the Applicant, a parent or affiliate organization that guarantees the obligations of the Applicant or any officer of the Applicant in the current year or within the two most recent years preceding the application.

There have not been any reorganizations, protection from creditors, or any other form of bankruptcy filings made by the Applicant, CASA, Inc., nor has any parent or affiliate organization that guarantees the obligation of the Applicant, nor has any officer of the Applicant in the current year or since Applicant last filed for certification.

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**CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
d.b.a., NORTH AMERICAN ENERGY ADVISORY**

Exhibit C-8

Bankruptcy information

Not applicable - the company has never gone bankrupt

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Exhibit C-9

"Merger Information,"

Provide a statement describing any dissolution or merger or acquisition of the applicant within the five most recent years preceding the application.

There has been no dissolution or merger or acquisition of the applicant, Customer Acquisition Specialists of America, Inc., /North American Energy Advisory, since the applicant last filed for certification.

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**CUSTOMER ACQUISITION SPECIALISTS OF AMERICA, INC.
d.b.a., NORTH AMERICAN ENERGY ADVISORY**

Exhibit C-9

Merger information

Not applicable - the company there has never been a merger or dissolution of the applicant

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