



DIS Case Number: 12-1793-GA-AGG

Section A: Application Information

A-1. Provider type:

☐ Retail Natural Gas
Broker

☐ Retail Natural Gas
Aggregator

☒ Retail Natural Gas
Marketer

A-2. Applicant's legal name and contact information.

Legal Name: Power Management Company
LLC

Country: United States

Phone: 5852491360 **Extension (if
applicable):**

Street: 1600 Moseley Road Suite 100

Website (if any): powermgt.com

City: Victor

Province/State: NY

Postal Code: 14564

A-3. Names and contact information under which the applicant will do business in Ohio

Provide the names and contact information the business entity will use for business in Ohio. This does not have to be an Ohio address and may be the same contact information given in A-2.

Name	Type	Address	Active?	Proof
PMC Lightsavers LLC	DBA	1600 Moseley Road Suite 100 Victor, NY 14564	Yes	File
Power Management Co. New England, LLC	DBA	1600 Moseley Road Suite 100 Victor, NY 14564	Yes	File

A-4. Names under which the applicant does business in North America

Provide all business names the applicant uses in North America, including the names provided in A-2 and A-3.

Name	Type	Address	Active?	Proof
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Public Utilities Commission

PMC Lightsavers LLC	DBA	1600 Moseley Road Suite 100 Victor, NY 14564	Yes	File
Power Management Co. New England, LLC	DBA	1600 Moseley Road Suite 100 Victor, NY 14564	Yes	File

A-5. Contact person for regulatory matters

Ben Roushey
1600 Moseley Road Suite 100
Victor, NY 14564
US
broushey@powermgt.com
5852491360

A-6. Contact person for PUCO Staff use in investigating consumer complaints

Ben Roushey
1600 Moseley Road Suite 100
Victor, NY 14564
US
broushey@powermgt.com
5852491360

A-7. Applicant's address and toll-free number for customer service and complaints

Phone: 5852491360	Extension (if applicable):	Country: United States
Fax: 5852491361	Extension (if applicable):	Street: 1600 Moseley Road, Suite 100,
Email: broushey@powermgt.com		City: Victor Province/State: NY
		Postal Code: 14564

A-8. Applicant's federal employer identification number

161541935

A-9. Applicant's form of ownership

Form of ownership: Limited Liability Company (LLC)

A-10. Identify current or proposed service areas

Identify each service area in which the applicant is currently providing service or intends to provide service and identify each customer class that the applicant is currently serving or intends to serve.

Service area selection

Columbia Gas of Ohio
Dominion Energy Ohio
Duke Energy Ohio
CenterPoint Energy Ohio

Class of customer selection

Industrial
Small Commercial
Large Commercial

A-11. Start date

Indicate the approximate start date the applicant began/will begin offering services: 07-09-2012

A-12. Principal officers, directors, and partners

Please provide all contacts that should be listed as an officer, director or partner.

Name	Email	Title	Address
John Burt	jburt@powermgt.com	CEO	1600 Moseley Rd Suite 100 Victor, NY 14564 US

A-13. Company history

Power Management Co., LLC is a privately held Energy Services Company registered in the State of New York and approved as an energy service company by the State Public Service Commission. Founded in November 1997, Power Management has grown into a highly diversified Energy Services provider. The company's customers include over 10,000 commercial accounts located throughout the continental United States. The company's corporate offices are located at 1600 Moseley Road, Suite 100, Victor, NY. Our telephone number is 585-249-1360 or toll free at 1 (888) 264-3698. Our corporate website is www.powermgt.com.



Public Utilities Commission

Power Management primarily serves as an Energy Consultant specializing in companies with multiple locations. We can arrange for the purchase of energy from several different energy suppliers. Power Management provides an objective analysis of various suppliers' commodity rates and contract terms to assure competitive programs for our customers. As an independent agent for various suppliers Power Management can provide the following products:

Commodity Supply Programs

Natural Gas

Electricity

Propane

Power Management works with business owners and facility managers to meet energy requirements, control and reduce energy use and improve facility operations. As more efficient energy conversion technologies and concepts are brought to market Power Management incorporates these technologies to implement cost effective solutions.

On-Site Generation Service

Lighting Projects

Facility Energy Management Programs & Services

Energy Information Services.

A-14. Secretary of State

Secretary of State Link:

A-15. Proof of Ohio Employee and Office

Provide proof of an Ohio Office and Employee in accordance with Section 4929.22 of the Ohio Revised Code. List the designated Ohio employee's name, Ohio office address, telephone number and web site address

Employee Name: CT Corporations Systems

1300 East 9th Street

Cleveland, OH 4414

US

danny.verdecchia@wolterskluwer.com

2526214270

Section B: Applicant Managerial Capability and Experience

B-1. Jurisdiction of operations

List all jurisdictions in which the applicant or any affiliated interest of the applicant is certified, licensed, registered or otherwise authorized to provide retail natural gas service or retail/wholesale electric service as of the date of filing the application..

Jurisdiction of Operation: States PMC is active and registered as a Broker of Gas or Electric

Delaware
Illinois
Maine
Maryland
New York
New Hampshire
Massachusetts
Pennsylvania
New Jersey
Rhode Island
Texas
Connecticut
District of Columbia
Virginia

B-2. Experience and plans

Describe the applicant's experience in providing the service(s) for which it is applying (e.g., number and type of customers served, utility service areas, amount of load, etc.). Include the 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 Sections 4928.10 and/or 4929.22 of the Ohio Revised Code.

Application Experience and Plan Description: Power Management's experience and plans for contracting with customers will continue to focus on large, multi-locational clients. We consult with those companies that have the desire to manage their various locations/energy portfolio to meet their corporate guidelines but would prefer to outsource that expertise directly and through third-party sales representatives.

Power Management plans to solicit businesses in Ohio where deregulation has the maximum potential of savings. All contact with the PUC approved suppliers will be handled at our corporate office in Victor, NY and communication with the Ohio clients will be handled by either our corporate or local business representative.



There will be no billing of any commodities directly by Power Management. Power Management will work as a liaison between the customer and supplier to ensure customer satisfaction. Each agent of Power Management will have business cards providing the business agent's contact information as well as Power Management's corporate information allowing customer inquiries and complaints to be handled to their satisfaction. Power Management also maintains a website (www.powermgt.com), which provides all information regarding the company and contact information.

B-3. Disclosure of liabilities and investigations

For the applicant, affiliate, predecessor of the applicant, or any principal officer of the applicant, describe all existing, pending or past rulings, judgments, findings, contingent liabilities, revocation of authority, regulatory investigations, judicial actions, or other formal or informal notices of violations, or any other matter related to competitive services in Ohio or equivalent services in another jurisdiction..

Liability and Investigations Disclosures: Power Management Co., LLC has no existing, pending or past rulings, judgments, contingent liabilities, revocations of authority, regulatory investigations or any other matters that could adversely impact the financial or operational status or ability to provide the energy brokerage or energy consulting services that we are requesting to be certified for in the State of Ohio.

B-4. Disclosure of consumer protection violations

Has the applicant, affiliate, predecessor of the applicant, or any principal officer of the applicant been convicted or held liable for fraud or for violation of any consumer protection or antitrust laws within the past five years?

No

B-5. Disclosure of certification, denial, curtailment, suspension or revocation

Has the applicant, affiliate, or a predecessor of the applicant had any certification, license, or application to provide retail natural gas or retail/wholesale electric service denied, curtailed, suspended, revoked, or cancelled or been terminated or suspended from any of Ohio's Natural Gas or Electric Utility's Choice programs within the past two years?

No



Section C: Applicant Financial Capability and Experience

C-1. Financial reporting

Provide a current link to the most recent Form 10-K filed with the Securities and Exchange Commission (SEC) or upload the form. If the applicant does not have a Form 10-K, submit the parent company's Form 10-K. If neither the applicant nor its parent is required to file Form 10-K, state that the applicant is not required to make such filings with the SEC and provide an explanation as to why it is not required.

Does not apply

C-2. Financial statements

Provide copies of the applicant's two most recent years of audited financial statements, including a 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, provide audited or officer certified financial statements covering the life of the business. If the applicant does not have a balance sheet, income statement, and cash flow statement, the applicant may provide a copy of its two most recent years of tax returns with **social security numbers and bank account numbers redacted**.

If the applicant is unable to meet the requirement for two years of financial statements, the Staff reviewer may request additional financial information.

Preferred to file this information confidentially

C-3. Forecasted financial statements

Provide two years of forecasted income statements **based solely on the applicant's anticipated business activities in the state of Ohio**.

Include the following information with the forecast: a list of assumptions used to generate the forecast; a statement indicating that the forecast is based solely on Ohio business activities only; and the name, address, email address, and telephone number of the preparer of the forecast.



The forecast may be in one of two acceptable formats: 1) an annual format that includes the current year and the two years succeeding the current year; or 2) a monthly format showing 24 consecutive months following the month of filing this application broken down into two 12-month periods with totals for revenues, expenses, and projected net incomes for both periods. Please show revenues, expenses, and net income (revenues minus total expenses) that is expected to be earned and incurred in **business activities only in the state of Ohio** for those periods.

If the applicant is filing for both an electric certificate and a natural gas certificate, please provide a separate and distinct forecast for revenues and expenses representing Ohio electric business activities in the application for the electric certificate and another forecast representing Ohio natural gas business activities in the application for the natural gas certificate.

Preferred to file confidentially

C-4. Credit rating

Provide a credit opinion disclosing the applicant's credit rating as reported by at least one of the following ratings agencies: Moody's Investors Service, Standard & Poor's Financial Services, Fitch Ratings or the National Association of Insurance Commissioners. If the applicant does not have its own credit ratings, substitute the credit ratings of a parent or an affiliate organization and submit a statement signed by a principal officer of the applicant's parent or affiliate organization that guarantees the obligations of the applicant. If an applicant or its parent does not have such a credit rating, enter 'Not Rated'.

File(s) attached

C-5. Credit report

Provide a copy of the applicant's credit report from Experian, Equifax, TransUnion, Dun and Bradstreet or a similar credit reporting organization. If the applicant is a newly formed entity with no credit report, then provide a personal credit report for the principal owner of the entity seeking certification. At a minimum, the credit report must show summary information and an overall credit score. **Bank/credit account numbers and highly sensitive identification information must be redacted.** If the applicant provides an acceptable credit rating(s) in response to C-4, then the applicant may select 'This does not apply' and provide a response in the box below stating that a credit rating(s) was provided in response to C-4.

File(s) attached



C-6. Bankruptcy information

Within the previous 24 months, have any of the following filed for reorganization, protection from creditors or any other form of bankruptcy?

- Applicant
- Parent company of the applicant
- Affiliate company that guarantees the financial obligations of the applicant
- Any owner or officer of the applicant

No

C-7. Merger information

Is the applicant currently involved in any dissolution, merger or acquisition activity, or otherwise participated in such activities within the previous 24 months?

Merger Information: On March 31, 2022 Power Management acquired certain assets from Stark Holdings America, Inc.

C-8. Corporate structure

Provide a graphical depiction of the applicant's corporate structure. Do not provide an internal organizational chart. The graphical depiction should include all parent holding companies, subsidiaries and affiliates as well as a list of all affiliate and subsidiary companies that supply retail or wholesale electricity or natural gas to customers in North America. If the applicant is a stand-alone entity, then no graphical depiction is required, and the applicant may respond by stating that it is a stand-alone entity with no affiliate or subsidiary companies.

Stand-alone entity with no affiliate or subsidiary companies

C-9. Financial arrangements

Provide copies of the applicant's financial arrangements to satisfy collateral requirements to conduct retail electric/natural gas business activities (e.g., parental guarantees, letters of credit, contractual arrangements, etc., as described below).

Renewal applicants may provide a current statement from an Ohio local distribution utility (LDU) that shows that the applicant meets the LDU's collateral requirements. The statement or letter must be on the utility's letterhead and dated within a 30-day period of the date the applicant files its renewal application.



First-time applicants or applicants whose certificate has expired must meet the requirements of C-9 in one of the following ways:

1. The applicant itself states that it is investment grade rated by Moody's Investors Service, Standard & Poor's Financial Services, or Fitch Ratings and provides evidence of rating from the rating agencies. If you provided a credit rating in C-4, reference the credit rating in the statement.
2. The applicant's parent company is investment grade rated (by Moody's, Standard & Poor's, or Fitch) and guarantees the financial obligations of the applicant to the LDU(s). Provide a copy of the most recent credit opinion from Moody's, Standard & Poor's or Fitch.
3. The applicant's parent company is not investment grade rated by Moody's, Standard & Poor's or Fitch but has substantial financial wherewithal **in the opinion of the Staff reviewer** to guarantee the financial obligations of the applicant to the LDU(s). The parent company's financials and a copy of the parental guarantee must be included in the application if the applicant is relying on this option.
4. The applicant can provide evidence of posting a letter of credit with the LDU(s) listed as the beneficiary, in an amount sufficient to satisfy the collateral requirements of the LDU(s).

File(s) attached

Section D: Applicant Technical Capacity

D-1. Operations

Gas Marketers: Describe the operational nature of the applicant's business, specifying whether operations will include the contracting of natural gas purchases for retail sales, the nomination and scheduling of retail natural gas for delivery, and/or the provision of retail ancillary services, as well as other services used to supply natural gas to the natural gas company city gate for retail customers.



Operations Description: Power Management Co., LLC works with various utilities to obtain client or potential client's load. Once the information is reviewed it is sent to suppliers for pricing. When pricing is received from all suppliers that quoted the customer Power Management analyzes each quote to determine which option Power Management will then recommend to the customer. If the client agrees to proceed Power Management orders contracts from the supplier and obtains the appropriate sign off from customer and submits the executed copy to the supplier. Power Management then confirms with the supplier that the client is enrolled and checks with the client to ensure accuracy in billing. Prior to the end of the contract Power Management will begin working on renewal options for client.

D-2. Operations Expertise & Key Technical Personnel

Given the operational nature of the applicant's business, provide evidence of the applicant's experience and technical expertise in performing such operations. Include the names, titles, e-mail addresses, and background of key personnel involved in the operations of the applicant's business.

Operations Expertise & Personnel Description: Lead by John Burt and Eric Douthit the existing staff represents over 70 years in experience in the energy industry. Most of the initial experience comes from the petroleum sector. Founded in 1997 Power Management currently has approximately 12,000 gas and electric meters and relationships with approximately 15-20 suppliers. Additionally, we are on contract with six (6) major companies on an energy consulting basis. Power Management currently has approximately 12,000 electric meters and 4,700 natural gas meters in 13 states including Connecticut, Delaware, Illinois, Massachusetts, Maryland, Maine, New Hampshire, New Jersey, New York, Ohio, Pennsylvania, Rhode Island and Texas. This represents over 1,700,000,000 kWh and 7,500,000 DTH annually.

John Burt
Chief Executive Officer
jburt@powermgt.com
1600 Moseley Road, Suite 100
Victor, NY 14564
Phone: 585-249-1360

Eric Douthit
President
edouthit@powermgt.com



1600 Moseley Road, Suite 100
Victor, NY 14564
Phone: 585-249-1360

Jerry Walter
Vice President of Operations
gwalter@powermgt.com
1600 Moseley Road, Suite 100
Victor, NY 14564
Phone: 585-249-1360



Public Utilities
Commission

Application Attachments

UNITED STATES OF AMERICA
STATE OF OHIO
OFFICE OF THE SECRETARY OF STATE

I, Frank LaRose, do hereby certify that I am the duly elected, qualified and present acting Secretary of State for the State of Ohio, and as such have custody of the records of Ohio and Foreign business entities; that said records show PMC LIGHTSAVERS, LLC (POWER MANAGEMENT CO., LLC), a New York Limited Liability Company, Registration Number 1729324, was registered in the State of Ohio on September 25, 2007, is currently authorized to transact business in this state.



*Witness my hand and the seal of the
Secretary of State at Columbus, Ohio
this 11th day of April, A.D. 2022.*

A handwritten signature in blue ink, appearing to read "Frank LaRose".

Ohio Secretary of State

Validation Number: 202210101920



Search inquiry: (My company)

CreditScoreSM Report

as of: 04/11/22 10:15 ET

Power Management LLC

Address:

732 E Broadway
Boston, MA 02127-1504
United States

Phone:

585-325-5050

Website:

powermgt.com

Experian [BIN](#):

722591761

Also is (or has been) operating as:

Power Management Co LLC

Family Linkage:

Ultimate Parent

Power Management LLC
732 E Broadway
Boston, MA

Branches / Alternative Locations

Power Management LLC
115 Eagle Rock Rd
Stoughton, MA United States

Power Management LLC
400 Andrews St Ste 600
Rochester, NY United States

Key Personnel:

Officer: Eric J Douthit
Officer: Burt John
Officer: Thomas W Hassett

SIC Code:

8748-Business Consulting Services, Nec
8711-Engineering Services
8999-Services, Nec

NAICS Code:

541690-Other Scientific And Technical Consulting Services
541330-Engineering Services
238210-Electrical Contractors And Other Wiring Installation Contractors

Business Type:

Corporation

Experian [File Established](#):

October 1998

Experian Years on File:

24 Years

Years in Business:

25 Years

Total Employees:

5

[Sales](#):

\$1,693,000

Filing Data Provided by:

New York

Experian Business Credit Score

83

Business Credit Score

Low Risk

The objective of the Experian Business Credit Score is to predict payment behavior. High Risk means that there is a significant probability of delinquent payment. Low Risk means that there is a good probability of on-time payment.

Key Score Factors:

- Number of good commercial accounts.
- Nbr of leasing accts as pct of total nbr of accts.
- Pct of new commercial accts to total nbr of accts.
- Length of time on Experian's file.

https://smallbusiness.experian.com/report.aspx?retry=true&fn=722591761&pnum=1015&day=10122&dpc=39.95&dco=Power+Management+LLC&mc=y&coinfo=Power+Management+LLC~732+E+Broadway~Boston...


1/4

Business Credit Scores range from a low of 1 to high of 100 with this company receiving a score of 83. Higher scores indicate lower risk. This score predicts the likelihood of serious credit delinquencies within the next 12 months. This score uses tradeline and collections information, public filings as well as other variables to predict future risk.

Experian Financial Stability Risk Rating

1

Financial Stability Risk Rating



A Financial Stability Risk Rating of 1 indicates a 0.55% potential risk of severe financial distress within the next 12 months.

Key Rating Factors:

- Number of active commercial accounts.
- Risk associated with the company's industry sector.
- Risk associated with the business type.
- Employee size of business.

Financial Stability Risk Ratings range from a low of 1 to high of 5 with this company receiving a rating of 1. Lower ratings indicate lower risk. Experian categorizes all businesses to fit within one of the five risk segments. This rating predicts the likelihood of payment default and/or bankruptcy within the next 12 months. This rating uses tradeline and collections information, public filings as well as other variables to predict future risk.

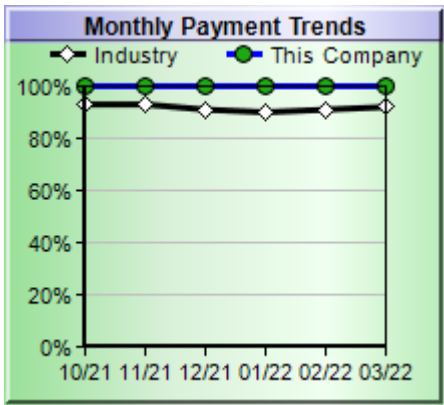
Credit Summary

Current Days Beyond Terms (DBT):	0
Predicted DBT for 06/08/2022:	1
Average Industry DBT:	4
Payment Trend Indicator:	No Trend Identifiable
Lowest 6 Month Balance:	\$2,702
Highest 6 Month Balance:	\$4,632
Current Total Account Balance:	\$0
Highest Credit Amount Extended:	\$0

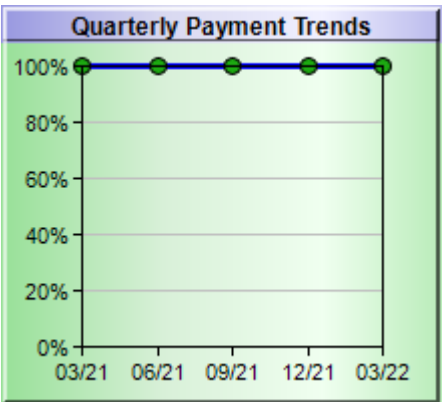
Payment Tradelines (see charts):	5
UCC Filings :	2
✓ Businesses Scoring Worse:	82%
✓ Bankruptcies:	0
■ Liens (see detail):	0
✓ Judgments Filed:	0
✓ Collections:	0

Company background: Founded in 1997, Power Management Company is located in Rochester, NY. The company offers energy consulting services and solutions for public and private companies. Its services include master energy purchasing, demand response, engineering, and development of energy strategies and analysis.

Payment Trend Summary



*Percentage of on-time payments by month.



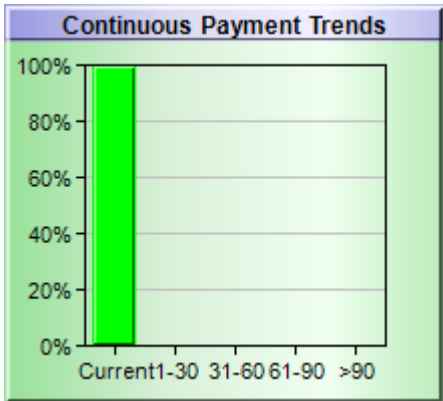
*Percentage of on-time payments by quarter.

Monthly Payment Trends - Recent Activity

Date	Current	Up to 30 DBT	31-60 DBT	61-90 DBT	>90 DBT
10/21	100%	0%	0%	0%	0%
11/21	100%	0%	0%	0%	0%
12/21	100%	0%	0%	0%	0%
01/22	100%	0%	0%	0%	0%
02/22	100%	0%	0%	0%	0%
03/22	100%	0%	0%	0%	0%

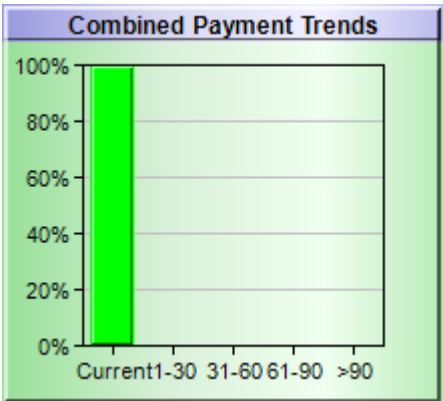
Quarterly Payment Trends - Recent Activity

Date	Current	Up to 30 DBT	31-60 DBT	61-90 DBT	>90 DBT
03/21	100%	0%	0%	0%	0%
06/21	100%	0%	0%	0%	0%
09/21	100%	0%	0%	0%	0%
12/21	100%	0%	0%	0%	0%
03/22	100%	0%	0%	0%	0%



*Continuous distribution with DBT.

Insufficient information to produce Newly Reported Payment Trends chart.



*Combined distribution with DBT.

Tax Lien Filings

Date: 05/16/2016
Owner: State Of Indiana
Filing Location: Marion Cnty Circuit/Superior/Municipal C
Legal Type: State Tax
Legal Action: Released
Document Number:10991537
Liability Amount: \$78
Description: Other Tax

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© 2022 Experian Information Solutions Inc.





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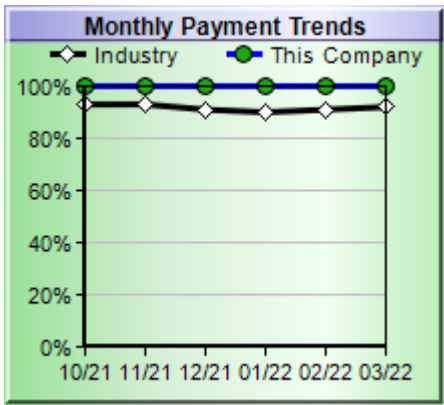
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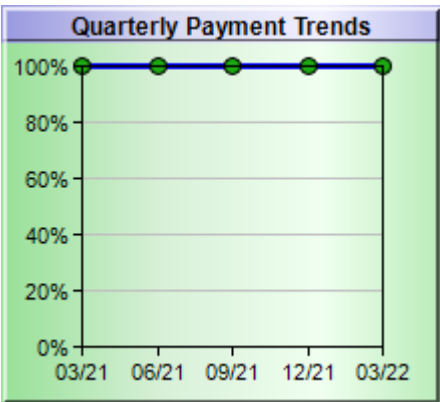
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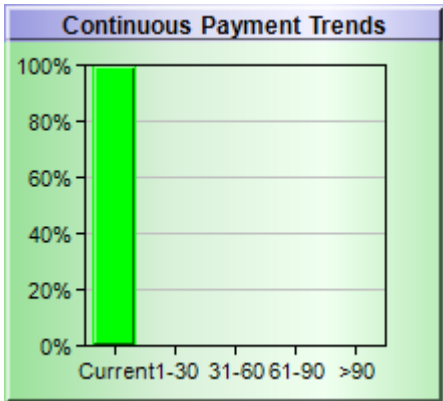
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02/22	100%	0%	0%	0%	0%
03/22	100%	0%	0%	0%	0%

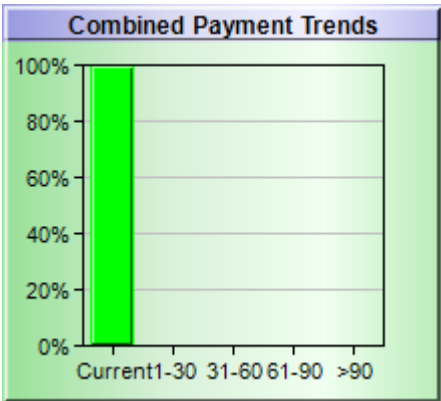
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12/21	100%	0%	0%	0%	0%
03/22	100%	0%	0%	0%	0%



*Continuous distribution with DBT.

Insufficient information to produce Newly Reported Payment Trends chart.



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Tax Lien Filings

Date: 05/16/2016
Owner: State Of Indiana
Filing Location: Marion Cnty Circuit/Superior/Municipal C
Legal Type: State Tax
Legal Action: Released
Document Number:10991537
Liability Amount: \$78
Description: Other Tax

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Exhibit C-9 “Financial Arrangements”

N/A. Power Management Co., LLC is not taking title to the electricity and is only seeking to be certified as an aggregator or broker.

Competitive Retail Natural Gas Service Affidavit

County of Monroe :

State of New York :

Eric J. Douthitt, Affiant, being duly sworn/affirmed, hereby states that:

1. The information provided within the certification or certification renewal application and supporting information is complete, true, and accurate to the best knowledge of affiant, and that it will amend its application while it is pending if any substantial changes occur regarding the information provided.
2. The applicant will timely file an annual report of its intrastate gross receipts and sales of hundred cubic feet of natural gas pursuant to Sections 4905.10(A), 4911.18(A), and 4929.23(B), Ohio Revised Code.
3. The applicant will timely pay any assessment made pursuant to Sections 4905.10 and 4911.18(A), Ohio Revised Code.
4. Applicant will comply with all applicable rules and orders adopted by the Public Utilities Commission of Ohio pursuant to Title 49, Ohio Revised Code.
5. Applicant 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. Applicant will comply with Section 4929.21, Ohio Revised Code, regarding consent to the jurisdiction of the Ohio courts and the service of process.
7. Applicant will comply with all state and/or federal rules and regulations concerning consumer protection, the environment, and advertising/promotions.
8. Applicant will inform the Public Utilities Commission of Ohio 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 consumer complaints.
9. The facts set forth above are true and accurate 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.
10. Affiant further sayeth naught.

Eric J. Douthitt
Signature of Affiant & Title

Sworn and subscribed before me this 12th day of April, 2022
Month Year

[Signature]
Signature of official administering oath

Benjamin Roushey Controller
Print Name and Title

My commission expires on

[Signature]

BENJAMIN ROUSHEY

NOTARY PUBLIC-STATE OF NEW YORK

No. 01RO6259991

Qualified in Monroe County

My Commission Expires 4/16/24

**This foregoing document was electronically filed with the Public Utilities
Commission of Ohio Docketing Information System on**

4/12/2022 4:20:44 PM

in

Case No(s). 12-1793-GA-AGG

Summary: In the Matter of the Application of Power Management Company LLC