



DIS Case Number: 18-0990-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:** Taurus Advisory Group LLC

**Phone:** 8555573440      **Extension (if applicable):**

**Website (if any):**  
<http://www.taurusadvisorygroup.com/>

**Country:** United States

**Street:** 27 Lawrence Rd

**City:** Madison

**Province/State:** NJ

**Postal Code:** 07940

### 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
Taurus Advisory Group LLC	Official Name	27 lawrence Rd Madison, NJ 07940	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
Taurus Advisory Group LLC	Official Name	27 lawrence Rd Madison, NJ 07940	Yes	File



**A-5. Contact person for regulatory matters**

Nathan Burroughs  
27 Lawrence rd  
Madison, NJ 07940  
US  
nburroughs@taurusag.com  
9087632077

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

Nicholas Gerome  
15555 North Park Ln  
Cleveland Heights, OH 44118  
US  
ngerome@taurusag.com  
8555573440

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

<b>Phone:</b> 855-557-3440	<b>Extension (if applicable):</b>	<b>Country:</b> United States
<b>Fax:</b>	<b>Extension (if applicable):</b>	<b>Street:</b> 27 Lawrence Rd, Madison, NJ 07940
<b>Email:</b> info@taurusag.com		<b>City:</b> Madison, <b>Province/State:</b> NJ
		<b>Postal Code:</b> 07940

**A-8. Applicant's federal employer identification number**

82-2818400

**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  
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: 07-06-2022

**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
Nathan Burroughs	nburroughs@taurusag.com	Managing Member	27 lawrence rd Madison, NJ 07940 US
Nicholas Gerome	ngerome@taurusag.com	Managing Member	15555 North Park Ln Cleveland Heights, OH 44118 US

**A-13. Company history**

Taurus Advisory Group is a New Jersey LLC, formed in September of 2017. We are an energy procurement advisory firm. Key personnel have a combined 70 years' experience in the energy sector – including industrial support of energy sector and production, in addition to intermediary brokering the sale and purchase of energy supply agreements.

**A-14. Secretary of State**

Secretary of State Link:

**A-15. Proof of Ohio Employee and Office**



## Public Utilities Commission

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:** Nicholas Gerome

15555 North Park Ln

Cleveland Heights, OH 44118

US

ngerome@taurusag.com

8555573440

## 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: • State of Ohio

- State of New Jersey
- State of Maryland
- State of Pennsylvania
- District of Columbia
- State of New Hampshire
- State of Massachusetts
- State of Maine
- State of Texas
- State of Illinois

### 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: Applicant's key personnel have over 30 years of combined experience acting as an intermediary in the sale and purchase of energy supply



## Public Utilities Commission

agreements in every deregulated market in the U.S. and Canada (including Ohio). Applicant will continue to leverage this experience to offer more personal attention for the Ohio energy end user at a cheaper cost.

Applicant will continue to be responsible for assisting clients in negotiating prices and contracts as well as providing assistance should any post-contractual issues arise. With dedicated customer service, we will continue to respond timely to customer inquiries and complaints, mainly in their relationship with the suppliers with whom we connect them via our brokering services. Any inquiries and complaints relating directly to our service will similarly be addressed, in accordance with Commission rules adopted pursuant to Section 4928.10 of the Revised Code.

Assistance with ancillary programs such as state, federal, and utility incentive offerings relating to energy, along with the vetting and execution of energy management and sustainability initiatives will also be offered.

We will continue to build upon existing relationships across the various facets of the energy and industrial sectors, and in some cases work with former clients and networks in the provision of services and the dissemination and marketing thereof.

### **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: Not Applicable

### **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**



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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.

File(s) attached

### C-3. Forecasted financial statements



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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.

File(s) attached

### **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'.

This does not apply

### **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**



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**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?

No

### **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

## **Section D: Applicant Technical Capacity**

### **D-1. Operations**





Retail natural gas brokers/aggregators: Include details of the applicant's business operations and plans for arranging and/or aggregating for the supply of natural gas to retail customers.

Retail natural gas brokers/aggregators: Include details of the applicant's business operations and plans for arranging and/or aggregating for the supply of natural gas to retail customers.

Operations Description: While Advisor/ Martin Benante provides oversight of operations at a macro level, the majority of work executed by the company on behalf of its customers is performed by its managing members, Nicholas Gerome and Nathan Burroughs.

This work includes:

- culling and packaging of market intelligence
- performing intermediary procurement activities for customers acting upon company recommendations
- Ensuring dependable list of suppliers with whom to engage clients and ensuring compliance with supplier procedures
- Tracking and external reporting on contract performance
- Tracking and internal reporting on all contractual consumption and earnings
- Managing client-facing personnel to ensure service requirements of each individual client are being met

- Ensuring compliance with client's complex procurement requirements/regulations

#### **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: Key personnel have over 30 years' combined experience overseeing the specific type of operations described herein. This includes specific experience acting as an intermediary in the sale and purchase of energy supply and engaging agreements in every deregulated market in the U.S. and Canada (including Ohio). This additionally includes specific experience managing and improving the functionality of said operations for four other companies (including a consultant, an energy supplier, and a brokerage).

Managing Member – Nicholas Gerome

Address – 15555 North Park Blvd, Cleveland Heights Ohio 44118



## Public Utilities Commission

Cell – 216.543.5100

Office – 855.557.3440

At his most recent previous place of employment, Mr. Gerome served as COO and was responsible for internal market intel, internal education on efficient operations, business streamlining, and instituting client-facing and internal protocols that led to growing that company's book of clients from 300 to over 1400 and growing that company's revenue by a similar multiple. And as previously noted, Mr. Gerome oversaw the day-to-day sourcing and operations of two leading energy procurement advisory firms for over 10 years and has executed over 30,000 energy supply agreements.

Managing Member – Nathan Burroughs

Address – 27 Lawrence Rd, Madison, NJ 07940

Cell – 908-763-2077

Office - 855.557.3440

In all current and previous roles over the course of his career, Mr. Burroughs has ensured that significant items compliance and service were adhered to and that client needs were impeccably served. His job security depended on the management of a variety of procurement, incentive, and grant projects averaging several million dollars per project for a variety of customers with budgets exceeding \$500 million. In his most recent position before coming to Taurus, Mr. Burroughs's operational expertise led to his company gaining over 40 clients whose procurement protocols were previously unattainable for his employer, in addition to garnering significant supplier refunds for said clients when operational guidelines were not met by suppliers.

Vice President, Operations – Tara Pasca

Address – 701 Lindsey Ct, Marlton, NJ

Cell – 609-560-9767

Office - 855.557.3440

Ms. Pasca is a Certified Energy Procurement Professional (CEP) who has been both a chapter and Board member of the Greater Philadelphia Association of Energy Engineers (GPAEE) since 2011, including stints as President and Vice President of the Chapter and is the GPAEE's current monthly Newsletter Editor. Over her 16 years working in energy procurement, she has played integral roles in managing dozens of intricate, large-scale procurement projects requiring significant tariff monitoring and expertise, along with stringent utility commission compliance responsibilities. She currently facilitates two electricity cooperative pricing systems, serving over 60,000 distinct meters and encompassing a spend of over \$400M. Tara has an impeccable reputation in the industry and is widely regarded by energy supply companies as a favorite of theirs with whom to work for her thorough, informed, and organized approach to every project. Below are examples of a few projects Tara managed prior to joining Taurus Advisory Group: The South Jersey Power Co-Op (SJPC) for the procurement of natural gas and electric supply service, the Passaic County Regional Energy Cooperative Pricing System (PCERCPS) for the procurement of natural gas and electric supply service, the Bergen County Cooperative Pricing System (BCPS) for the procurement of natural gas and electric supply service, the Stafford Township



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Cooperative Pricing System (STCPS) for the procurement of natural gas supply service, the Hunterdon County Cooperative Pricing System (HCCPS) for the procurement of electric supply service, the New Jersey Sustainable Energy Joint Meeting (NJSEM) for the procurement of natural gas and electric supply service, the Township of Brick for the procurement of electric supply service and the City of Hoboken for the procurement of natural gas and electric supply service.



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 TAURUS ADVISORY GROUP LLC, a New Jersey Limited Liability Company, Registration Number 4077833, was registered in the State of Ohio on September 26, 2017, is currently authorized to transact business in this state.*



*Witness my hand and the seal of the  
Secretary of State at Columbus, Ohio  
this 5th day of May, A.D. 2022.*

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

**Ohio Secretary of State**

**Validation Number: 202212501000**



May 5, 2022

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

**RE: Officer Certification of Financial Documentation  
For the Public Utilities Commission of Ohio**

Taurus Advisory Group does not have audited financial statements. Per section C-2 of the CRNG renewal application, we are submitting the enclosed statements and witnessed officer certification. If another method of officer certification is required, please let me know. Thanks so much for the time and efforts of the PUCO in addressing our submission.

Best,

Nathan Burroughs  
Managing Member  
Taurus Advisory Group  
[nburroughs@taurusag.com](mailto:nburroughs@taurusag.com)  
908-763-2077

27 Lawrence Road  
Madison, NJ 07940  
[info@taurusag.com](mailto:info@taurusag.com)  
[www.taurusag.com](http://www.taurusag.com)

# Taurus Advisory Group

## Balance Sheet

As of December 31, 2020

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
Checking	9,198.40
Primary Checking	56,836.76
Veem	0.00
<b>Total Bank Accounts</b>	<b>\$66,035.16</b>
Other Current Assets	
Loan Receivable - Viceroy	396.58
<b>Total Other Current Assets</b>	<b>\$396.58</b>
<b>Total Current Assets</b>	<b>\$66,431.74</b>
<b>TOTAL ASSETS</b>	<b>\$66,431.74</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable (A/P)	0.00
<b>Total Accounts Payable</b>	<b>\$0.00</b>
Credit Cards	
Chase Credit Card	0.00
PNC Credit Card - 9085	1,680.21
<b>Total Credit Cards</b>	<b>\$1,680.21</b>
Other Current Liabilities	
Loan Payable - Viceroy	0.00
<b>Total Other Current Liabilities</b>	<b>\$0.00</b>
<b>Total Current Liabilities</b>	<b>\$1,680.21</b>
Long-Term Liabilities	
Loan - Martin Benante	951,592.40
Loan - PPP	76,000.00
<b>Total Long-Term Liabilities</b>	<b>\$1,027,592.40</b>
<b>Total Liabilities</b>	<b>\$1,029,272.61</b>
Equity	
Common Stock	100.00
Retained Earnings	-863,499.66
Net Income	-99,441.21
<b>Total Equity</b>	<b>\$ -962,840.87</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$66,431.74</b>

# Taurus Advisory Group

## Profit and Loss

January - December 2020

	TOTAL
Income	
Sales	776,111.22
<b>Total Income</b>	<b>\$776,111.22</b>
GROSS PROFIT	<b>\$776,111.22</b>
Expenses	
Accounting	6,440.00
Advertising & Marketing	892.45
Web Design	1,411.50
<b>Total Advertising &amp; Marketing</b>	<b>2,303.95</b>
Bank Charges & Fees	293.34
Charitable Contributions	3,705.44
Client Gifts	1,140.00
Continuing Education	1,545.00
Contractors	
Best Home Solutions, LLC	1,602.01
Bryan Ruggiero	18,649.87
C2C Energy Advisors LLC	145,157.00
CE Systems (IT)	923.04
Chris Darling	300.00
Christabel Escobar	740.56
CMG Funding Group	3,218.56
Crystal Perez	21.34
David Boyza	1,820.35
Energytek, LLC	78,487.36
Gina Salazar	478.60
Jennifer Aparicio	1,122.97
Kiran Srikanth	1,650.00
McKinzy Consultant Services	11,611.51
Nathan Dubasik	2,720.13
Peter Gerome	5,000.00
Ramp Energy	6,372.74
Robert Bejaran	255.70
Rock Promotions LLC	33,115.65
Sara Orlando	3,600.66
SurePoint Consulting LLC	11,111.50
THG Energy Solutions, LLC	21,000.00
Wendy Rivas	7,357.11
Yolanda Anderson	7,924.90
<b>Total Contractors</b>	<b>364,241.56</b>
Employee Benefits	15,360.69
Insurance	9,685.34



# Taurus Advisory Group

## Profit and Loss

January - December 2020

	TOTAL
Legal & Professional Services	8,954.34
Meals & Entertainment	15,266.12
Miscellaneous	1,298.76
Office Supplies & Software	8,195.07
Office/General Administrative Expenses	14,170.44
<b>Total Office Supplies &amp; Software</b>	<b>22,365.51</b>
Other Business Expenses	42.60
Payroll Exchange	0.00
Payroll Service Fees	2,629.00
Payroll Taxes	28,913.20
Postage	487.44
Salaries & Wages	372,239.90
Taxes & Licenses	10,705.04
Telephone Expense	667.46
Travel	7,057.18
Utilities	136.17
<b>Total Expenses</b>	<b>\$875,478.04</b>
NET OPERATING INCOME	<b>\$ -99,366.82</b>
Other Income	
Cash Back Rewards	525.61
<b>Total Other Income</b>	<b>\$525.61</b>
Other Expenses	
political contribution	600.00
<b>Total Other Expenses</b>	<b>\$600.00</b>
NET OTHER INCOME	<b>\$ -74.39</b>
NET INCOME	<b>\$ -99,441.21</b>

# Taurus Advisory Group

## Statement of Cash Flows

January - December 2020

	TOTAL
OPERATING ACTIVITIES	
Net Income	-99,441.21
Adjustments to reconcile Net Income to Net Cash provided by operations:	
PNC Credit Card - 9085	-1,088.15
<b>Total Adjustments to reconcile Net Income to Net Cash provided by operations:</b>	<b>-1,088.15</b>
<b>Net cash provided by operating activities</b>	<b>\$ -100,529.36</b>
FINANCING ACTIVITIES	
Loan - Martin Benante	35,000.00
Loan - PPP	76,000.00
<b>Net cash provided by financing activities</b>	<b>\$111,000.00</b>
<b>NET CASH INCREASE FOR PERIOD</b>	<b>\$10,470.64</b>
Cash at beginning of period	55,564.52
<b>CASH AT END OF PERIOD</b>	<b>\$66,035.16</b>

# Taurus Advisory Group

## Balance Sheet

As of December 31, 2021

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
Checking	9,198.40
PNC - 5734	3,996.21
PNC - 5742	0.00
Primary Checking	128,142.27
Veem	0.00
<b>Total Bank Accounts</b>	<b>\$141,336.88</b>
Other Current Assets	
Loan Receivable - Viceroy	0.00
<b>Total Other Current Assets</b>	<b>\$0.00</b>
<b>Total Current Assets</b>	<b>\$141,336.88</b>
<b>TOTAL ASSETS</b>	<b>\$141,336.88</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable (A/P)	0.00
<b>Total Accounts Payable</b>	<b>\$0.00</b>
Credit Cards	
Chase Credit Card	0.00
PNC Credit Card - 3094	1,480.64
PNC Credit Card - 9085	1,094.42
<b>Total Credit Cards</b>	<b>\$2,575.06</b>
Other Current Liabilities	
Loan Payable - Viceroy	29,091.82
<b>Total Other Current Liabilities</b>	<b>\$29,091.82</b>
<b>Total Current Liabilities</b>	<b>\$31,666.88</b>
Long-Term Liabilities	
Loan - Martin Benante	927,426.46
Loan - PPP	0.00
<b>Total Long-Term Liabilities</b>	<b>\$927,426.46</b>
<b>Total Liabilities</b>	<b>\$959,093.34</b>
Equity	
Common Stock	100.00
Retained Earnings	-962,940.87
Net Income	145,084.41
<b>Total Equity</b>	<b>\$ -817,756.46</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$141,336.88</b>

# Taurus Advisory Group

## Profit and Loss

January - December 2021

	TOTAL
Income	
Sales	946,471.32
<b>Total Income</b>	<b>\$946,471.32</b>
GROSS PROFIT	<b>\$946,471.32</b>
Expenses	
Accounting	6,820.00
Advertising & Marketing	9,578.47
Web Design	5,028.00
<b>Total Advertising &amp; Marketing</b>	<b>14,606.47</b>
Bank Charges & Fees	351.71
Charitable Contributions	859.07
Conferences	4,918.52
Continuing Education	5,503.32
Contractors	
Best Home Solutions, LLC	378.91
Bryan Ruggiero	30,503.41
C2C Energy Advisors LLC	73,814.07
David Boyza	1,469.02
Energytek, LLC	67,040.05
Jeff Chavkin	5,016.49
Joseph Murphy	4,758.54
McKinzy Consultant Services	7,984.06
Nathan Dubasik	3,493.02
Ramp Energy	18,249.17
Rock Promotions LLC	21,745.70
Sara Orlando	159.89
SurePoint Consulting LLC	6,984.06
THG Energy Solutions, LLC	33,692.00
Wendy Rivas	5,364.91
Yolanda Anderson	4,924.89
<b>Total Contractors</b>	<b>285,578.19</b>
Dues & Subscriptions	605.00
Employee Benefits	28,161.78
Holiday Expense	214.75
Insurance	27,383.32
Legal & Professional Services	13,279.46
Meals & Entertainment	22,883.82
Miscellaneous	860.54
Office Supplies & Software	8,931.45
Office/General Administrative Expenses	13,877.97
<b>Total Office Supplies &amp; Software</b>	<b>22,809.42</b>

# Taurus Advisory Group

## Profit and Loss

January - December 2021

	TOTAL
Payroll Exchange	0.00
Payroll Service Fees	3,219.00
Payroll Taxes	37,412.54
Postage	508.77
Salaries & Wages	141,846.19
Salaries & Wages - Officers	325,408.00
Taxes & Licenses	5,422.59
Telephone Expense	1,260.29
Travel	10,461.72
Utilities	848.00
<b>Total Expenses</b>	<b>\$961,222.47</b>
NET OPERATING INCOME	<b>\$ -14,751.15</b>
Other Income	
Cash Back Rewards	1,734.99
Grant Income	10,000.00
Interest Income	0.57
PPP Forgiven	152,000.00
<b>Total Other Income</b>	<b>\$163,735.56</b>
Other Expenses	
political contribution	3,900.00
<b>Total Other Expenses</b>	<b>\$3,900.00</b>
NET OTHER INCOME	<b>\$159,835.56</b>
NET INCOME	<b>\$145,084.41</b>

# Taurus Advisory Group

## Statement of Cash Flows


January - December 2021

	TOTAL
OPERATING ACTIVITIES	
Net Income	145,084.41
Adjustments to reconcile Net Income to Net Cash provided by operations:	
Loan Receivable - Viceroy	396.58
PNC Credit Card - 3094	1,480.64
PNC Credit Card - 9085	-585.79
Loan Payable - Viceroy	29,091.82
<b>Total Adjustments to reconcile Net Income to Net Cash provided by operations:</b>	<b>30,383.25</b>
<b>Net cash provided by operating activities</b>	<b>\$175,467.66</b>
FINANCING ACTIVITIES	
Loan - Martin Benante	-24,165.94
Loan - PPP	-76,000.00
<b>Net cash provided by financing activities</b>	<b>\$ -100,165.94</b>
<b>NET CASH INCREASE FOR PERIOD</b>	<b>\$75,301.72</b>
Cash at beginning of period	66,035.16
<b>CASH AT END OF PERIOD</b>	<b>\$141,336.88</b>

**Officer Certification of Financial Documentation  
For the Public Utilities Commission of Ohio**

I, Nathan Burroughs – Managing Member of Taurus Advisory Group LLC (company) – am established by the company’s official operating agreement as a duly authorized signatory to certify as follows on behalf of the company:

All enclosed financial statements submitted to the Public Utilities Commission of Ohio as part of the renewal of PUCO Certificate No. 18-667G(1) docketed under Case Number 18-0990-GA-AGG are complete, true, and accurate to the best of my present knowledge, information and belief. Further, I expect the company to be willing and able to prove the same at any review, audit, or hearing hereof.

By:  Date: May 5, 2022  
Nathan Burroughs

Witnessed:  Date: May 5, 2022  
Tara Pasca

# Forecasted Financial Statement

Taurus Advisory Group LLC

Forecasted Financials - 2020 & 2021

5.5.22

	2022 1/1/2021-12/31/2021	2023 1/1/2022-12/31/2022
<b>REVENUES</b>		
Natural Gas Brokering	\$ 20,000.00	\$ 22,000.00
	-	-
	-	-
	-	-
<b>TOTAL REVENUES</b>	<b>20,000.00</b>	<b>22,000.00</b>
<b>COST OF GOODS SOLD</b>		
Marketing		
Professional Development	500.00	500.00
Travel/Entertainment	300.00	300.00
Salaries-Direct/Commissions	7,000.00	7,700.00
Depreciation-Direct		-
Supplies	150.00	150.00
License Associated Costs		30.00
<b>TOTAL Operating Expenses</b>	<b>7,950.00</b>	<b>8,680.00</b>
<b>Operating Profit</b>	<b>12,050.00</b>	<b>13,320.00</b>
<b>NET INCOME</b>	<b>\$ 12,050.00</b>	<b>\$ 13,320.00</b>

**Assumptions** - Each year's forecast assumes:

- \* 10% gross revenue increase based on 2018 to 2019 numbers
- \* 35% average commission expense rate based on current average
- \* Approximately equivalent costs for supplies and licensing as in previous years
- \* Approximately equivalent costs for travel, entertainment, and professional development as previous years

Prepared by:

Nick Gerome

15555 n Park Blvd, Cleveland Heights Oh 44118

[ngerome@taurusag.com](mailto:ngerome@taurusag.com)

855.557.3440





Search inquiry: Taurus Advisory Group / Madison / NJ / (My company)

CreditScore<sup>SM</sup> Report

as of: 05/05/22 11:34 ET

Taurus Advisory Group LLC

Address:

27 Lawrence Rd  
Madison, NJ 07940-2800  
United States

Phone:

908-763-2077

Website:

www.taurusadvisorygroup.com

Experian [BIN](#):

430758271

Key Personnel:

Director: Nicholas J Gerome  
Member: Nathan M Burroughs  
Manager: Gerone Nicholas

SIC Code:

8748-Business Consulting Services,  
Nec  
4931-Electric & Other Services  
Combined  
8711-Engineering Services

NAICS Code:

541618-Other Management  
Consulting Services  
221100-Electric Power Generation,  
Transmission And  
Distribution  
541330-Engineering Services

Business Type:

Corporation

Experian [File](#)  
[Established](#):

October 2017

Experian Years on File:

5 Years

Years in Business:

More than 5 Years

Total Employees:

3

Filing Data Provided by:

New Jersey

Date of Incorporation:

09/18/2017

Experian Business Credit Score

52

Business Credit  
Score

Low-Medium 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 commercial accounts with net 1-30 days term.

• Number of derogatory commercial accounts.

• Nbr of active commercial accts within the last 12 mos.

• Number of recently active commercial accounts.

https://smallbusiness.experian.com/report.aspx?fn=430758271&pnum=1015&day=12522&dpc=39.95&link=5502&dco=Taurus+Advisory+Group+LLC&mc=y&coinfo=Taurus+Advisory+Group+LLC~27+Lawrence+Rd~...

1/3

**Business Credit Scores range from a low of 1 to high of 100 with this company receiving a score of 52.** 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.
- Balance to high credit ratio for commercial accounts.

**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

This location does not yet have an estimated Days Beyond Terms ([DBT](#)), or a Payment Trend Indicator. This is often the result of too few Payment [Tradelines](#).

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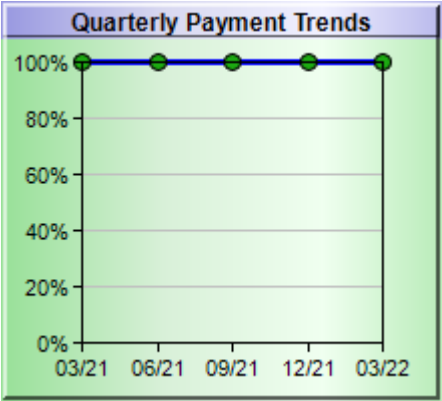
**Lowest 6 Month Balance:** \$44  
**Highest 6 Month Balance:** \$4,580  
**Current Total Account Balance:** \$0  
**Highest Credit Amount Extended:** \$0

**Payment [Tradelines](#)** (see [charts](#)): 5  
**[UCC Filings](#):** 0

■ **Businesses Scoring Worse:** 51%  
✓ **Bankruptcies:** 0  
✓ **Liens:** 0  
✓ **Judgments Filed:** 0  
✓ **Collections:** 0

Payment Trend Summary

Insufficient information to produce  
**Monthly Payment Trends**  
chart.

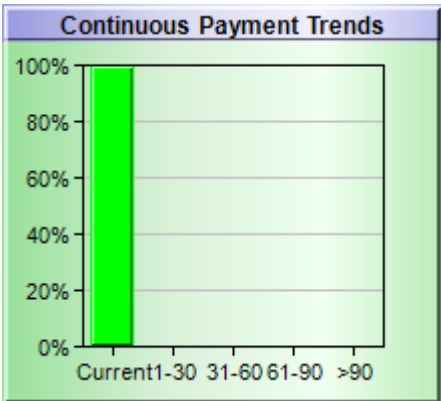


\*Percentage of on-time payments by quarter.

Insufficient information to produce  
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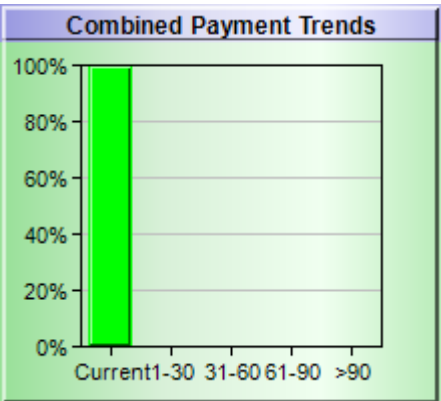
**Quarterly Payment Trends - Recent Activity**

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.

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# Competitive Retail Natural Gas Service Affidavit

County of Burlington :

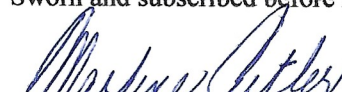
State of New Jersey :

Nathan Burroughs, 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.

  
Signature of Affiant & Title

Sworn and subscribed before me this 9 day of May 2022  
Month Year

  
Signature of official administering oath

Marlene Cutler  
Print Name and Title

My commission expires on  
MARLENE CUTLER  
NOTARY PUBLIC OF NEW JERSEY

My Commission Expires May 5, 2023



Search inquiry: Taurus Advisory Group / Madison / NJ / (My company)

CreditScore<sup>SM</sup> Report

as of: 05/05/22 11:34 ET

Taurus Advisory Group LLC

Address:

27 Lawrence Rd  
Madison, NJ 07940-2800  
United States

Phone:

908-763-2077

Website:

www.taurusadvisorygroup.com

Experian [BIN](#):

430758271

Key Personnel:

Director: Nicholas J Gerome  
Member: Nathan M Burroughs  
Manager: Gerone Nicholas

SIC Code:

8748-Business Consulting Services,  
Nec  
4931-Electric & Other Services  
Combined  
8711-Engineering Services

NAICS Code:

541618-Other Management  
Consulting Services  
221100-Electric Power Generation,  
Transmission And  
Distribution  
541330-Engineering Services

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Corporation

Experian [File](#)  
[Established](#):

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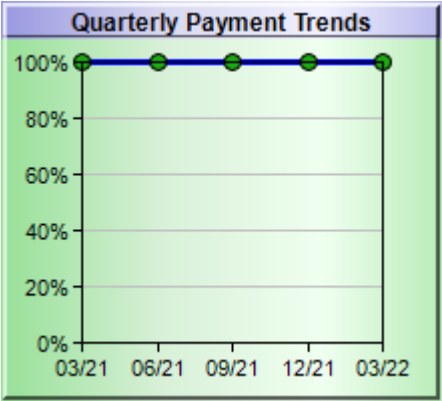
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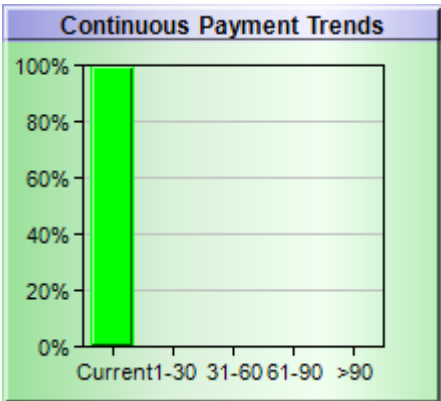


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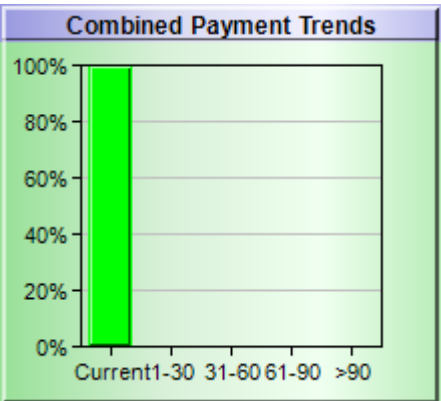
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12/21	100%	0%	0%	0%	0%
03/22	100%	0%	0%	0%	0%



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Commission of Ohio Docketing Information System on**

**5/20/2022 1:55:44 PM**

**in**

**Case No(s). 18-0990-GA-AGG**

**Summary: In the Matter of the Application of Taurus Advisory Group LLC**