



DIS Case Number: 15-0591-EL-AGG

## Section A: Application Information

### A-1. Provider type:

☒ Power Broker    ☐ Aggregator    ☐ Retail Generation Provider    ☐ Power Marketer

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

**Legal Name:** Convenient Ventures, LLC

**Country:** United States

**Phone:** 7178484100    **Extension (if applicable):**

**Street:** 415 Norway Street

**Website (if any):**  
<https://energyobjective.com/>

**City:** York

**Province/State:** PA

**Postal Code:** 17403

### 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
EnergyObjective	DBA	415 Norway Street York, PA 17403	Yes	Link
Shipley Energy Advisors	DBA	415 Norway St York, PA 17403	No	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
EnergyObjective	DBA	415 Norway Street York, PA 17403	Yes	Link



## Public Utilities Commission

Shipley Energy Advisors	DBA	415 Norway St York, PA 17403	No	File
----------------------------	-----	---------------------------------	----	------

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

Tim Booth  
415 Norway St  
York, PA 17403  
US  
tbooth@energyobjective.com  
7177711894

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

Tim Booth  
415 Norway St  
York, PA 17403  
US  
tbooth@energyobjective.com  
7177711894

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

**Phone:** 8665699935      **Extension (if applicable):**      **Country:** United States  
**Fax:**      **Extension (if applicable):**      **Street:** 415 Norway Street  
**Email:** contactus@energyobjective.com      **City:** York      **Province/State:** PA  
**Postal Code:** 17403

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

75-3078746

### 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

Duke Energy Ohio  
 FirstEnergy - Cleveland Electric Illuminating  
 FirstEnergy - Ohio Edison  
 FirstEnergy - Toledo Edison  
 AES Ohio  
 American Electric Power (AEP)

### Class of customer selection

Commercial  
 Industrial  
 Mercantile

### A-11. Start date

Indicate the approximate start date the applicant began/will begin offering services: 04-27-2015

### 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
Dave Gruno	dgruno@shipleynenergy.com	CEO	415 Norway Street York, PA 17403 US
Richard Beamsderfer	rbeamsderfer@shipleynenergy.com	Treasurer	415 Norway Street York, PA 17403 US
Matt Sommer	msommer@shipleynenergy.com	President	415 Norway Street York, PA 17403 US

### A-13. Company history



## Public Utilities Commission

Convenient Ventures LLC, dba Shipley Energy Advisors is a PJM focused natural gas and electricity consultant. Parent company Shipley Energy has been delivering petroleum products for over 90 years. EnergyObjective now dubbed Shipley Energy Advisors after a recent merger in 2021, was formed in the early 2000's after deregulation in the state of Pennsylvania. We currently serve just under 370 clients, with our average size being 1,000,000 kWh per customer.

### **A-14. Secretary of State**

Secretary of State Link: <https://businesssearch.ohiosos.gov?=businessDetails/2361294>

## 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: Convenient Ventures LLC dba Shipley Energy Advisors is licensed as a broker for Natural Gas in Pennsylvania, Maryland, Ohio, and New Jersey. Shipley Energy Advisors is licensed as a broker for Electricity in Delaware, Illinois, Maryland, New Jersey, Ohio, and Pennsylvania.

### **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: Convenient Ventures LLC dba Shipley Energy Advisors is licensed as a broker for Natural Gas in Pennsylvania, Maryland, Ohio, and New Jersey. Shipley Energy Advisors is licensed as a broker for Electricity in Delaware, Illinois, Maryland, New Jersey, Ohio, and Pennsylvania. The company is not actively marketing in Ohio but will be generating RFPs when approached to do business in Ohio. We will contract with the supplier and not the end user. The company will respond to customer complaints and inquiries in accordance with the revised codes.

### **B-3. Disclosure of liabilities and investigations**



## Public Utilities Commission

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: N/A. No liabilities or investigations to report.

### **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'.

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 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.

Preferred to file this information confidentially

#### 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: Convenient Ventures dba EnergyObjective, now dba Shipley Energy Advisors merged with company Lykins Energy Advisors of Ohio.

#### **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.

File(s) attached

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

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

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





Operations Description: Clients request pricing through the Shipley Commercial Sales team. The Shipley Commercial Sales team provides the client's contact information, bill copies when provided, and a signed LOA or LOE when provided to our pricing desk. The designated Shipley Commercial Sales team rep works as the liaison between Shipley Energy Advisors, and the client. We manage the relationship with the suppliers on behalf of the Shipley representative and the client. Our pricing desk solicits quotes from all licensed OH suppliers and provides the designated Shipley sales rep with an offer outlining product that fit the client's procurement goals. Once a client signs an agreement with the chosen supplier, the Shipley rep stays in touch with the client and provides them with market updates and renewal offers when appropriate.

**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.

File(s) attached



Public Utilities  
Commission

# Application Attachments

Shipley Energy  
(Parent Company)

```
graph TD; A[Shipley Energy  
(Parent Company)] --- B[Convenient Ventures LLC,  
dba Shipley Energy Advisors  
(Electric and Natural Gas  
Broker)];
```

Convenient Ventures LLC,  
dba Shipley Energy Advisors  
(Electric and Natural Gas  
Broker)

## Technical and Managerial Competency

Convenient Ventures, LLC d/b/a Shipley Energy Advisors is a subsidiary of parent Shipley Group, LP, which is a fourth-generation family-owned company started in 1929. Based out of York, Pennsylvania, Shipley has been supplying natural gas since about 2002 and electricity since early 2013. Our gas territory serves 4 BCF/year to all customer classes in UGI, Columbia Gas of PA, PECO, BG&E and WG&L; our electric supply territory currently includes 5,800 PPL, Met-Ed and PECO residential customers. We have been a member of PJM since late 2012. Under a separate license, Shipley Energy also brokered electricity to about 370 commercial and industrial customers in Pennsylvania since 2009. (In late 2014, this license was replaced with a broker license for Convenient Ventures, LLC.) In addition to electricity and natural gas, the separate companies of Shipley Group, LP serve fuel oil, propane, gasoline, HVAC service, and several additional services to a total of 60,000 residential, commercial and industrial customers.

Dave Gruno (CEO) and Matthew Sommer (President of Shipley Group) guide the strategic plans of the company and will help lead the Ohio approach. Richard Beamesderfer (CFO) leads a competent and well-staffed finance team. Tim Booth (General Manager of Shipley Energy Advisors) and Carly Castillo (Energy Business Associate of Shipley Energy Advisors) control all broker relationships, pricing, administration, and customer-level sales strategy. They are instrumental in both the setup and day-to-day operations of the Ohio natural gas and electricity business. (Resumes for each of these key personnel are below.)

A team of experienced commercial and industrial salespeople will focus on customer relationships and help get us off the ground in the new state. Each C&I customer will then be assigned a dedicated renewal representative.

**DAVE GRUNO:** dgruno@shipleyenergy.com, 717-771-1839

Shipley Group, CEO	2016-Present
Shipley Stores, President	2013-2016
Shipley Group, Vice President of Human Resources and Environment	2009-2013
Shipley Fuels Marketing, Manager	2004-2008
Willow Valley Associates, Director of Human Resources	1998-2004
Cintas, Human Resources Manager/ Office Manager	1995-1998
Air Force Reserve, Manpower Specialist for Contingency Operations	1992 -1995
Air Force, Mission Support Specialist	1988-1992
Troy University, BS, Human Resource Management	1994

**RICHARD BEAMESDERFER:** rmbeamesderfer@shipleyenergy.com, 717-771-1928

Shipley Group and Shipley Energy, CFO, Treasurer	1996-Present
Health South Corporation, CFO - Rehab Hospital of York	1987-1996
Manor Care, Tax Investment Analyst	1983-1987
George Washington University, MBA, Finance	1989
Certified Public Accountant	1986
Andrews University, BBA, Accounting	1983

**MATTHEW SOMMER:** msommer@shipleyenergy.com, 717-771-1877

Shipley Group, President & COO	2013-Present
--------------------------------	--------------

Shiple Energy, Chief Marketing Officer	2012-2013
Shiple Energy, Vice President of Natural Gas and Electricity	2002-2011
George Washington University, BA, Economics	2001

**TIMOTHY BOOTH:** [tbooth@shipleenergyadvisors.com](mailto:tbooth@shipleenergyadvisors.com), 717-771-1894

Shiple Energy Advisors, General Manager	2014-Present
Shiple Energy, Manager of Electricity	2011-2014
Shiple Energy, Gas and Power Market Specialist	2009-2011
Millersville University of PA, MBA	2008
York College of PA, BA, Mass Communications	2003

**CARLY CASTILLO:** [ccastillo@shipleenergyadvisors.com](mailto:ccastillo@shipleenergyadvisors.com)

Shiple Energy Advisors, Energy Business Associate	2022 – Present
Shiple Energy Advisors, Energy Procurement Intern	2020 – 2022
Pennsylvania State University, BS, Business Management & Marketing	2021

# Competitive Retail Electric Service Affidavit

County of York :

State of Pennsylvania :

Timothy A. Booth, 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, gross earnings, and sales of kilowatt-hours of electricity pursuant to Sections 4905.10(A), 4911.18(A), and 4928.06(F), Ohio Revised Code.
3. The applicant will timely pay any assessment made pursuant to Sections 4905.10, 4911.18, and 4928.06(F), Ohio Revised Code.
4. The 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. The 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. The applicant will fully comply with Section 4928.09, Ohio Revised Code regarding consent to the jurisdiction of Ohio Courts and the service of process.
7. The applicant will comply with all state and/or federal rules and regulations concerning consumer protection, the environment, and advertising/promotions.
8. The applicant 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 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, 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.
11. The 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.

12. 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.

13. Affiant further sayeth naught.

JB GM  
Signature of Affiant & Title

Sworn and subscribed before me this 27<sup>th</sup> day of April, 2023  
Month Year

Commonwealth of Pennsylvania - Notary Seal  
AUTUMN E WILLIAMS - Notary Public  
York County  
My Commission Expires April 15, 2026  
Commission Number 1418314

Signature of official administering oath

Autumn Williams

Print Name and Title

My commission expires on 4/15/2026

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

**4/27/2023 4:50:44 PM**

**in**

**Case No(s). 15-0591-EL-AGG**

Summary: In the Matter of the Application of Convenient Ventures, LLC