



DIS Case Number: 15-1208-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: Edge Insights, Inc **Country:** United States
Phone: 6108987101 **Extension (if applicable):** **Street:** 2 Meridian Blvd., Suite 106
Website (if any): www.edgeinsights.com **City:** Wyomissing **Province/State:** PA
Postal Code: 19610

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
Edge Insights, Inc.	Official Name	2 Meridian Blvd, Suite 106 Wyomissing, PA 19610	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
Edge Insights, Inc.	Official Name	2 Meridian Blvd, Suite 106 Wyomissing, PA 19610	Yes	File

A-5. Contact person for regulatory matters



Public Utilities Commission

Gene Waltz
2 Meridian Blvd., Suite 106
Wyomissing, PA 19610
US
gene.waltz@edgeinsights.com
6108987112

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

Gene Waltz
2 Meridian Blvd., Suite 106
Wyomissing, PA 19610
US
gene.waltz@edgeinsights.com
6108987112

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

Phone: 6108987112	Extension (if applicable):	Country: United States
Fax:	Extension (if applicable):	Street: 2 Meridian Blvd Suite 106
Email: gene.waltz@edgeinsights.com		City: Wyomissing
		Province/State: PA
		Postal Code: 19610

A-8. Applicant's federal employer identification number

23-2630670

A-9. Applicant's form of ownership

Form of ownership: Corporation

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: 12-19-2011

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
Gene Waltz	gene.waltz@edgeinsights.com	VP and Financial Contact	2 Meridian Blvd., Suite 106 Wyomissing, PA 19610 US
Mary Alice Waltz	maryalice.waltz@edgeinsights.com		2 Meridian Blvd., Suite 106 Wyomissing, PA 19610 US

A-13. Company history

The company was founded in 1991 as UtiliTech, Inc. and focuses on utility bill auditing. In 2013, UtiliTech, Inc. re-branded to Edge Insights, Inc. As energy deregulation occurred in many states, Edge Insights added energy brokerage to our auditing services. Today Edge Insights, Inc provides indirect cost management in the areas of energy, tele-communications, and waste. Services include bill auditing and procurement.

A-14. Secretary of State

Secretary of State Link:



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: Edge Insights Inc. is licensed to perform energy Broker and Consulting services in the following states: PA, MA, MD, DE, NJ, IL, NY, TX as well as Ohio.

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: As a broker of electric power, Edge Insights, Inc. is not party to the process of billing end customers or providing statements. Likewise, Edge Insights, Inc. does not directly receive customer inquiries and/or complaints' relative to their electric service and billing.

Edge Insights, Inc. has been providing consulting and brokerage service in de-regulated markets for over twenty years. The company's contracts with customers are through direct sales efforts and through referrals and associations.

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: There are no existing, pending or past rulings, judgments, contingent liabilities, revocations of authority, regulatory investigations or any other matter that could adversely impact the applicant's financial or operational status or ability to provide the services it is seeking to be certified to provide, that the company is aware of at this time.

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



Public Utilities Commission

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

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



Public Utilities Commission

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.

This does not apply.

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

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: Edge Insights, Inc. does not do any aggregation. Each clients' needs are addressed individually. Our standard procedure is to provide multiple quotes for electrical power to our clients for their decision.

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

Edge Insights Balance Sheet

Year To Date 12/31/2022

Assets

Current Assets

Cash and Cash Equivalents	199,751.69
1000 - Cash - Fulton Checking	199,751.69
Total Cash and Cash Equivalents	

Accounts Receivable, Net

Accounts Receivable	246,265.81
1100 - Accounts Receivable	246,265.81
Total Accounts Receivable	

Allowance for Doubtful Accounts	12,000.00
1110 - Allowance for Doubtful Accounts	12,000.00
Total Allowance for Doubtful Accounts	

Total Accounts Receivable, Net	234,265.81
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Prepaid Expenses	21,717.08
1300 - Prepaid Expenses	11,711.92
1310 - Prepaid Insurance	33,429.00
Total Prepaid Expenses	

467,446.50

Total Current Assets

Fixed Assets, Net

Fixed Assets	71,412.80
1700 - Office Equipment	71,412.80
Total Fixed Assets	

Accumulated Depreciation	71,412.80
1800 - Accumulated Depreciation - Office Equipment	71,412.80
Total Accumulated Depreciation	

0.00

Total Fixed Assets, Net

Intangible Assets, Net

Intangible Assets	150,000.00
1730 - Covenant Not to Compete	(150,000.00)
1830 - Accumulated Amortization - Covenant Not to Compete	0.00
Total Intangible Assets	

Goodwill	203,480.74
1900 - Goodwill	203,480.74
Total Goodwill	

203,480.74

Total Intangible Assets, Net

Investments

Investment in Subsidiary	504.05
1500 - Investment - FOCAL Communications	504.05
Total Investment in Subsidiary	

504.05

Total Investments

Other Assets

Deposits and Prepayments	5,371.06
1510 - Deposits	5,371.06
Total Deposits and Prepayments	

5,371.06

Total Other Assets

Edge Insights
Balance Sheet
Year To Date 12/31/2022

Total Assets	\$ 676,802.35
Liabilities and Equity	
Liabilities	
Current Liabilities	
Accounts Payable	10,416.15
2000 - Accounts Payable	10,416.15
Total Accounts Payable	
Accrued Liabilities	5,119.78
2330 - Accrued Commissions	23,373.94
2380 - Accrued Expenses - Other	18,161.84
2390 - Accrued Employee Bonuses	46,655.56
Total Accrued Liabilities	
Deferred Revenue	8,990.00
2420 - Deferred Revenue	8,990.00
Total Deferred Revenue	
Total Current Liabilities	66,061.71
Total Liabilities	66,061.71
Stockholders Equity	
Partners Equity	(1,034,783.97)
3220 - Shareholder Distributions - Denem	(650,291.56)
3300 - Shareholder Distributions	(1,685,075.53)
Total Partners Equity	
Capital Stock	800,000.00
3200 - Captial - Denem	800,000.00
Total Capital Stock	
Retained Earnings	704,073.13
3000 - Retained Earnings	704,073.13
Total Retained Earnings	
Net Income (Loss)	791,743.04
Total Stockholders Equity	610,740.64
Total Liabilities and Equity	\$ 676,802.35

Edge Insights Historical Balance Sheet

	Year To Date December 31, 2021	Prior Year To Date December 31, 2020
Assets		
Current Assets	292,484	495,298
Cash and Cash Equivalents	181,855	190,227
Accounts Receivable, Net	15,520	6,183
Prepaid Expenses	489,859	691,708
Total Current Assets		
Fixed Assets, Net	71,412	71,412
Fixed Assets	71,412	71,412
Accumulated Depreciation	-	-
Total Fixed Assets, Net		
Intangible Assets, Net	203,480	203,480
Goodwill	203,480	203,480
Total Intangible Assets, Net		
Investments	504	504
Investment in Subsidiary	504	504
Total Investments		
Other Assets	5,371	5,371
Deposits and Prepayments	5,371	5,371
Total Other Assets		
Total Assets	\$ 699,214	\$ 901,063
Liabilities and Equity		
Current Liabilities	13,886	4,479
Accounts Payable	92,961	77,401
Accrued Liabilities	28,206	-
Deferred Revenue	4,572	8,960
Income Tax Payable	139,625	90,840
Total Current Liabilities		
Long Term Liabilities	-	221,825
Note Payable - Long Term	-	221,825
Total Long Term Liabilities		
Other Liabilities	-	115,278
Other Liabilities	-	115,278
Total Other Liabilities		
Stockholders Equity	559,589	473,120
Total Liabilities and Equity	\$ 699,214	\$ 901,063

Edge Insights

Profit and Loss - Prior Year Comparison

	Month Ending 12/31/2022	Month Ending 12/31/2021	Variance	Year To Date December 31, 2022	Prior Year To Date December 31, 2021	Variance
Revenue - Sales						
Sales	215,692	227,198	(11,506.00)	2,876,187	3,022,685	(146,498.00)
Total Revenue - Sales	215,692	227,198	(11,506.00)	2,876,187	3,022,685	(146,498.00)
Cost of Revenue						
Salaries & Wages - Operations	47,373	62,502	(15,130.00)	597,258	707,761	(110,503.00)
Commissions - Operations	1,500	358	1,143.00	12,520	15,785	(3,266.00)
Bonuses - Operations	1,400	12,632	(11,233.00)	18,600	110,916	(92,315.00)
Health Insurance - Operations	5,383	10,166	(4,782.00)	50,643	120,047	(69,405.00)
Employee Retirement - Operations	1,454	78,861	(77,408.00)	20,020	115,420	(95,400.00)
Payroll Taxes - Operations	3,686	4,502	(815.00)	57,688	59,783	(2,095.00)
Consulting - Waste	1,600	1,600	-	19,200	19,200	-
Professional Services - Agent Commissions	(22,430)	96	(22,526.00)	2,893	39,396	(36,502.00)
Professional Services - Certified Consultant	560	520	40.00	7,367	6,920	447.00
Total Cost of Revenue	40,526	171,237	(130,711.00)	786,189	1,195,228	(409,039.00)
Gross Profit	175,166	55,961	119,204.00	2,089,998	1,827,457	262,541.00
Operating Expenses						
Licenses & Permits	-	(2,748)	2,748.00	2,788	3,848	(1,061.00)
Contributions	-	(303)	303.00	8,865	10,697	(1,832.00)
Dues & Subscriptions	1,443	718	724.00	15,200	4,028	11,172.00
Professional Services - Legal	-	100	(100.00)	468	1,200	(732.00)
Professional Services - Accounting	4,125	2,879	1,247.00	52,011	18,918	33,093.00
Lodging	-	-	-	960	829	131.00
Transportation	2,881	3,256	(376.00)	44,276	36,904	7,373.00
Meals	793	449	345.00	5,457	4,160	1,297.00
Entertainment	85	-	85.00	2,691	2,441	249.00
Office Supplies	443	4,140	(3,697.00)	7,241	16,846	(9,605.00)
Postage & Shipping	-	50	(50.00)	249	1,354	(1,105.00)
Marketing & Advertising	1,079	2,319	(1,240.00)	48,692	42,373	6,319.00
Telecommunications	1,353	1,391	(38.00)	19,135	18,289	847.00
Health Insurance - SG&A	6,927	-	6,927.00	69,633	-	69,632.00
Bonuses - SG&A	81,515	66,362	15,153.00	124,152	78,836	45,316.00
Employee Retirement Expenses - SG&A	3,509	960	2,548.00	23,659	2,231	21,428.00
Payroll Taxes - SG&A	6,342	5,912	430.00	50,011	48,707	1,304.00
HR Administrative Fee	2,243	2,653	(409.00)	27,051	27,661	(610.00)
Salaries & Wages - SG&A	47,187	52,058	(4,871.00)	639,536	560,240	79,295.00
Cleaning Services	906	1,230	(323.00)	8,284	4,113	4,171.00
Rent	8,640	8,639	1.00	105,167	101,771	3,396.00
Utilities	-	178	(178.00)	-	1,588	(1,588.00)
Bank Service Charges	383	203	180.00	3,836	2,305	1,531.00
Miscellaneous Expense	3,600	5,341	(1,742.00)	3,600	23,385	(19,785.00)
IT Maintenance Expense	2,449	2,891	(441.00)	27,555	45,111	(17,557.00)
Insurance - Automobile	-	-	-	(500)	-	(500.00)
Insurance - General Liability	408	1,100	(692.00)	3,000	13,201	(10,200.00)
Taxes - Mercantile	-	375	(375.00)	4,887	4,572	315.00
Taxes - Miscellaneous	-	-	-	59	-	59.00
Total Operating Expenses	176,311	160,153	16,158.00	1,297,963	1,075,608	222,354.00
Other Income (Expense)						

Edge Insights

Profit and Loss - Prior Year Comparison

	Month Ending 12/31/2022 Actual	Month Ending 12/31/2021 Actual	Variance	Year To Date December 31, 2022	Prior Year To Date December 31, 2021	Variance
Other Income	-	12	(12.00)	321	222,075	(221,754.00)
Other Income	-	12	(12.00)	321	222,075	(221,754.00)
Total Other Income	-	12	(12.00)	321	222,075	(221,754.00)
Other Expense	-	-	-	(449)	-	(449.00)
Interest Expenses	-	-	-	(449)	-	(449.00)
Total Interest Expense	-	-	-	(449)	-	(449.00)
Other Expenses	-	-	-	(164)	-	(164.00)
Other Expense	-	-	-	(164)	-	(164.00)
Total Other Expenses	-	12	(12.00)	(292)	222,075	(222,367.00)
Total Other Income (Expense)	(1,145)	(104,180)	103,035.00	791,743	973,924	(182,181.00)
Net Income (Loss)						

Edge Insights

Profit and Loss - Prior Year Comparison

	Year To Date December 31, 2021	Prior Year To Date December 31, 2020	Variance
Revenue - Sales			
Sales	3,022,685	3,181,934	(159,249.00)
Total Revenue - Sales	3,022,685	3,181,934	(159,249.00)
Cost of Revenue			
Salaries & Wages - Sales	707,761	705,742	2,019.00
Commissions - Sales	15,785	10,318	5,467.00
Bonuses - Sales	110,916	76,138	34,777.00
Health Insurance - Sales	120,047	97,427	22,621.00
Employee Retirement - Sales	38,434	122,292	(83,859.00)
Payroll Taxes - Sales	59,783	58,651	1,133.00
Consulting - Waste	19,200	19,200	-
Professional Services - Agent Commissions	39,396	52,078	(12,683.00)
Professional Services - Certified Consultant	6,920	6,420	500.00
Total Cost of Revenue	1,118,242	1,148,266	(30,025.00)
Gross Profit	1,904,443	2,033,668	(129,225.00)
Operating Expenses			
Licenses & Permits	3,847	6,600	(2,752.00)
Contributions	10,697	5,160	5,537.00
Dues & Subscriptions	4,029	7,775	(3,746.00)
Professional Services - Legal	1,200	1,100	100.00
Professional Services - Accounting	18,917	11,000	7,917.00
Lodging	830	1,282	(452.00)
Transportation	36,904	33,692	3,212.00
Meals	4,159	1,693.00	2,466.00
Entertainment	2,442	11,246	(8,804.00)
Office Supplies	16,792	11,669	5,122.00
Postage & Shipping	1,354	1,875	(520.00)
Marketing & Advertising	42,373	29,421	12,952.00
Telecommunications	18,289	26,769	(8,481.00)
Bonuses - Office Staff	78,836	75,951	2,886.00
Employee Retirement Expenses - Office	2,231	-	2,231.00
Payroll Taxes - Office Staff	48,707	45,363	3,344.00
HR Administrative Fee	27,661	27,012	649.00
Salaries & Wages - Office Staff	560,240	550,006	10,234.00
Cleaning Services	4,113	2,093	2,019.00
Rent	101,771	95,955	5,817.00
Utilities	1,588	-	1,588.00
Bank Service Charges	2,305	1,421	884.00
Miscellaneous Expense	23,385	23,436	(51.00)
IT Maintenance Expense	45,111	44,257	855.00
Insurance - General Liability	13,201	13,049	151.00
Taxes - Mercantile	4,572	4,782	(210.00)
Total Operating Expenses	1,075,554	1,033,380	42,175.00
Other Income (Expense)			
Other Income	222,075	-	222,074.00
Total Other Income	222,075	-	222,074.00

Edge Insights

Profit and Loss - Prior Year Comparison

Total Other Income (Expense)
Net Income (Loss)

	Year To Date December 31, 2021	Prior Year To Date December 31, 2020	Variance
	222,075	-	222,074.00
	<u>\$ 1,050,964</u>	<u>\$ 1,000,288</u>	<u>50,675.00</u>



May 23, 2023

Edge Insights projected revenue for 2023 from Ohio electric brokerage clients is \$74,241.



Experience and Technical Expertise

Name: Gene T. Waltz
Title: Executive Vice President
Telephone: 610-898-7112
Email: gene.waltz@edgeinsights.com
Background: More than 40 years or management experience from Information Technology to Utility Auditing to Energy Procurement. With Edge Insights since 2008 overseeing all aspects of its energy auditing and procurement business.

Name: Ken Gill
Title: Senior Energy Consultant
Telephone: 610-898-7106
Email: ken.gill@edgeinsights.com
Background: More than 30 years or experience as an analyst and consultant performing utility bill audits and energy procurement. With Edge Insights since 1992 directly involved in all aspects of its energy auditing and procurement business.

Name: Jim Graffius
Title: Senior Energy Consultant
Telephone: 610-898-7124
Email: jim.graffius@edgeinsights.com
Background: More than 15 years or experience as an analyst and consultant performing utility bill audits and energy procurement. With Edge Insights since 2008 directly involved in all aspects of its energy auditing and procurement business.

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 EDGE INSIGHTS, INC. (UTILITECH, INC.), a Pennsylvania corporation, having qualified to do business within the State of Ohio on April 29, 2011 under License No. 2017392 is currently in GOOD STANDING upon the records of this office.



*Witness my hand and the seal of the
Secretary of State at Columbus, Ohio
this 31st day of May, A.D. 2023.*

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

Ohio Secretary of State

Validation Number: 202315102778

Competitive Retail Electric Service Affidavit

County of Berks :

State of Pennsylvania:

GENE T. WALTZ, 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.

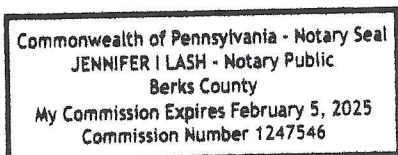
C.T. Lash Exec. V.P.
Signature of Affiant & Title

Sworn and subscribed before me this 5th day of June, 2023
Month Year

Jennifer I. Lash
Signature of official administering oath

Jennifer I. Lash Notary
Print Name and Title

My commission expires on 2/5/2025



**This foregoing document was electronically filed with the Public Utilities
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in

Case No(s). 15-1208-EL-AGG

Summary: In the Matter of the Application of Edge Insights, Inc