



Public Utilities Commission

PUCO USE ONLY – Version 1.08		
Date Received	Renewal Certification Number	ORIGINAL AGG Case Number
		15 - 0650 - GA-AGG

RENEWAL CERTIFICATION APPLICATION COMPETITIVE RETAIL NATURAL GAS BROKERS/AGGREGATORS

Please type or print all required information. Identify all attachments with an exhibit label and title (*Example: Exhibit A-15 - Company History*). All attachments should bear the legal name of the Applicant. Applicants should file completed applications and all related correspondence with the Public Utilities Commission of Ohio, Docketing Division, 180 East Broad Street, Columbus, Ohio 43215-3793.

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

SECTION A - APPLICANT INFORMATION AND SERVICES

A-1 Applicant intends to renew its certificate as: (check all that apply)

☒ Retail Natural Gas Aggregator ☒ Retail Natural Gas Broker

A-2 Applicant information:

Legal Name Taylor Consulting and Contracting, LLC
Address 625 Main St Avoca, PA 18641
Telephone No. 570 414 0880 Web site Address www.taylorcc.com
Current PUCO Certificate No. 15-433G Effective Dates 5/3/2015

A-3 Applicant information under which applicant will do business in Ohio:

Name as above
Address
Web site Address Telephone No.

A-4 List all names under which the applicant does business in North America:

Taylor Consulting and Contracting LLC
TaylorCC

A-5 Contact person for regulatory or emergency matters:

Name rudi miklosvary Title VP - Compliance
Business Address 625 Main Street Avoca PA 18641
Telephone No. 570 414 0880 Fax No. 570 414 0884 Email Address rmiklosvary@taylorcc.com

2015 MAR 29 PM 12:55
RECEIVED-DOCKETING DIV
PUCO
This is to certify that the images appearing are an accurate and complete reproduction of a case file document delivered in the regular course of business
Date Processed 3/29/15
Technician

A-6 . Contact person for Commission Staff use in investigating customer complaints:

Name Sara Zelinski Title Sales Support Manager
Business address 625 Main Street Avoca PA 18641
Telephone No. 570 414 0880 Fax No. 570 414 0884 Email Address szelinski@taylorcc.com

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

Customer service address 625 Main St Avoca PA 18641
Toll-Free Telephone No. 877 237 9936 Fax No. 570 414 0884 Email Address szelinski@taylorcc.com

A-8 Provide "Proof of an Ohio Office and Employee," in accordance with Section 4929.22 of the Ohio Revised Code, by listing name, Ohio office address, telephone number, and Web site address of the designated Ohio Employee

Name National Registered Agents Title Agent
Business address 1300 East Ninth St, Cleveland OH 44114
Telephone No. 855 521 8780 Fax No. Email Address rmiklosvary@taylorcc.com

A-9 Applicant's federal employer identification number 55-0871893

A-10 Applicant's form of ownership: (Check one)

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

A-11 (Check all that apply) Identify each natural gas company service area in which the applicant is currently providing service or intends to provide service, including identification of each customer class that the applicant is currently serving or intends to serve, for example: *residential, small commercial, and/or large commercial/industrial (mercantile) customers*. (A mercantile customer, as defined in Section 4929.01(L)(1) of the Ohio Revised Code, means a customer that consumes, other than for residential use, more than 500,000 cubic feet of natural gas per year at a single location within the state or consumes natural gas, other than for residential use, as part of an undertaking having more than three locations within or outside of this state. In accordance with Section 4929.01(L)(2) of the Ohio Revised Code, "Mercantile customer" excludes a not-for-profit customer that consumes, other than for residential use, more than 500,000 cubic feet of natural gas per year at a single location within this state or consumes natural gas, other than for residential use, as part of an undertaking having more than three locations within or outside this state that has filed the necessary declaration with the Public Utilities Commission.)

<input checked="" type="checkbox"/> Columbia Gas of Ohio	<input type="checkbox"/> Residential	<input checked="" type="checkbox"/> Small Commercial	<input checked="" type="checkbox"/> Large Commercial / Industrial
<input checked="" type="checkbox"/> Dominion East Ohio	<input type="checkbox"/> Residential	<input checked="" type="checkbox"/> Small Commercial	<input checked="" type="checkbox"/> Large Commercial / Industrial
<input checked="" type="checkbox"/> Duke Energy Ohio	<input type="checkbox"/> Residential	<input checked="" type="checkbox"/> Small Commercial	<input checked="" type="checkbox"/> Large Commercial / Industrial
<input checked="" type="checkbox"/> Vectren Energy Delivery of Ohio	<input type="checkbox"/> Residential	<input checked="" type="checkbox"/> Small Commercial	<input checked="" type="checkbox"/> Large Commercial / Industrial

A-12 If applicant or an affiliated interest previously participated in any of Ohio's Natural Gas Choice Programs, for each service area and customer class, provide approximate start date(s) and/or end date(s) that the applicant began delivering and/or ended services.

☒ Columbia Gas of Ohio

<input type="checkbox"/> Residential	Beginning Date of Service	End Date
<input checked="" type="checkbox"/> Small Commercial	Beginning Date of Service 1/1/18	End Date 1/1/21
<input type="checkbox"/> Large Commercial	Beginning Date of Service	End Date
<input type="checkbox"/> Industrial	Beginning Date of Service	End Date

☒ Dominion East Ohio

<input type="checkbox"/> Residential	Beginning Date of Service	End Date
<input checked="" type="checkbox"/> Small Commercial	Beginning Date of Service 1/1/18	End Date 1/1/21
<input type="checkbox"/> Large Commercial	Beginning Date of Service	End Date
<input type="checkbox"/> Industrial	Beginning Date of Service	End Date

☒ Duke Energy Ohio

<input type="checkbox"/> Residential	Beginning Date of Service	End Date
<input checked="" type="checkbox"/> Small Commercial	Beginning Date of Service 12/1/18	End Date 12/1/19
<input type="checkbox"/> Large Commercial	Beginning Date of Service	End Date
<input type="checkbox"/> Industrial	Beginning Date of Service	End Date

☐ Vectren Energy Delivery of Ohio

<input type="checkbox"/> Residential	Beginning Date of Service	End Date
<input type="checkbox"/> Small Commercial	Beginning Date of Service	End Date
<input type="checkbox"/> Large Commercial	Beginning Date of Service	End Date
<input type="checkbox"/> Industrial	Beginning Date of Service	End Date

A-13 If not currently participating in any of Ohio's four Natural Gas Choice Programs, provide the approximate start date that the applicant proposes to begin delivering services:

<input type="checkbox"/>	Columbia Gas of Ohio	Intended Start Date
<input type="checkbox"/>	Dominion East Ohio	Intended Start Date
<input type="checkbox"/>	Duke Energy Ohio	Intended Start Date
<input type="checkbox"/>	Vectren Energy Delivery of Ohio	Intended Start Date

PROVIDE THE FOLLOWING AS SEPARATE ATTACHMENTS AND LABEL AS INDICATED.

- A-14 Exhibit A-14 "Principal Officers, Directors & Partners,"** provide the names, titles, addresses and telephone numbers of the applicant's principal officers, directors, partners, or other similar officials.
- A-15 Exhibit A-15 "Company History,"** provide a concise description of the applicant's company history and principal business interests.
- A-16 Exhibit A-16 "Articles of Incorporation and Bylaws,"** provide the articles of incorporation filed with the state or jurisdiction in which the applicant is incorporated and any amendments thereto, *only if the contents of the originally filed documents changed since the initial application.*
- A-17 Exhibit A-17 "Secretary of State,"** provide evidence that the applicant is still currently registered with the Ohio Secretary of the State.

SECTION B - APPLICANT MANAGERIAL CAPABILITY AND EXPERIENCE

PROVIDE THE FOLLOWING AS SEPARATE ATTACHMENTS AND LABEL AS INDICATED

- B-1 Exhibit B-1 "Jurisdictions of Operation,"** provide a current list of all jurisdictions in which the applicant or any affiliated interest of the applicant is, at the date of filing the application, certified, licensed, registered, or otherwise authorized to provide retail natural gas service, or retail/wholesale electric services.
- B-2 Exhibit B-2 "Experience & Plans,"** provide a current description of the applicant's experience and plan for contracting with customers, providing contracted services, providing billing statements, and responding to customer inquiries and complaints in accordance with Commission rules adopted pursuant to Section 4929.22 of the Revised Code and contained in Chapter 4901:1-29 of the Ohio Administrative Code.
- B-3 Exhibit B-3 "Summary of Experience,"** provide a concise and current summary of the applicant's experience in providing the service(s) for which it is seeking renewed certification (e.g., number and types of customers served, utility service areas, volume of gas supplied, etc.).
- B-4 Exhibit B-4 "Disclosure of Liabilities and Investigations,"** provide a description of all 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 for which it is seeking renewed certification since applicant last filed for certification.

- B-5 Exhibit B-5 "Disclosure of Consumer Protection Violations,"** disclose whether the applicant, affiliate, predecessor of the applicant, or any principal officer of the applicant has been convicted or held liable for fraud or for violation of any consumer protection or antitrust laws since applicant last filed for certification.

☒ No ☐ Yes

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

- B-6 Exhibit B-6 "Disclosure of Certification Denial, Curtailment, Suspension, or Revocation,"** disclose whether the applicant or a predecessor of the applicant has had any certification, license, or application to provide retail natural gas or retail/wholesale electric service denied, curtailed, suspended, or revoked, or whether the applicant or predecessor has been terminated from any of Ohio's Natural Gas Choice programs, or been in default for failure to deliver natural gas since applicant last filed for certification.

☒ No ☐ Yes

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

SECTION C - APPLICANT FINANCIAL CAPABILITY AND EXPERIENCE

PROVIDE THE FOLLOWING AS SEPARATE ATTACHMENTS AND LABEL AS INDICATED

- C-1 Exhibit C-1 "Annual Reports,"** provide the two most recent Annual Reports to Shareholders. If applicant does not have annual reports, the applicant should provide similar information, labeled as Exhibit C-1, or indicate that Exhibit C-1 is not applicable and why.
(This is generally only applicable to publicly traded companies who publish annual reports.)
- C-2 Exhibit C-2 "SEC Filings,"** provide the most recent 10-K/8-K Filings with the SEC. If applicant does not have such filings, it may submit those of its parent company. If the applicant does not have such filings, then the applicant may indicate in Exhibit C-2 whether the applicant is not required to file with the SEC and why.
- C-3 Exhibit C-3 "Financial Statements,"** provide copies of the applicant's two most recent years of audited financial statements (balance sheet, income statement, and cash flow statement). If audited financial statements are not available, provide officer certified financial statements. If the applicant has not been in business long enough to satisfy this requirement, it shall file audited or officer certified financial statements covering the life of the business. 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 account numbers redacted).

C-4 Exhibit C-4 “Financial Arrangements,” provide copies of the applicant's financial arrangements to satisfy collateral requirements to conduct retail electric/gas business activity (e.g., parental or third party guarantees, contractual arrangements, credit agreements, etc.,).

Renewal applicants can fulfill the requirements of Exhibit C-4 by providing a current statement from an Ohio local distribution utility (LDU) that shows that the applicant meets the LDU's collateral requirements.

First time applicants or applicants whose certificate has expired as well as renewal applicants can meet the requirement by one of the following methods:

1. The applicant itself stating that it is investment grade rated by Moody's, Standard & Poor's or Fitch and provide evidence of rating from the rating agencies.
2. Have a parent company or third party that is investment grade rated by Moody's, Standard & Poor's or Fitch guarantee the financial obligations of the applicant to the LDU(s).
3. Have a parent company or third party that 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 guarantor company's financials must be included in the application if the applicant is relying on this option.
4. Posting a Letter of Credit with the LDU(s) as the beneficiary.

If the applicant is not taking title to the electricity or natural gas, enter “N/A” in Exhibit C-4. An N/A response is only applicable for applicants seeking to be certified as an aggregator or broker.

C-5 Exhibit C-5 “Forecasted Financial Statements,” provide two years of forecasted income statements for the applicant's **NATURAL GAS related business activities in the state of Ohio Only**, along with a list of assumptions, and the name, address, email address, and telephone number of the preparer. The forecasts should be in an annualized format for the two years succeeding the Application year.

C-6 Exhibit C-6 “Credit Rating,” provide a statement disclosing the applicant's current credit rating as reported by two of the following organizations: Duff & Phelps, Fitch IBCA, Moody's Investors Service, Standard & Poor's, or a similar organization. In instances where an applicant does not have its own credit ratings, it may substitute the credit ratings of a parent or an affiliate organization, provided the applicant submits a statement signed by a principal officer of the applicant's parent or affiliate organization that guarantees the obligations of the applicant. If an applicant or its parent does not have such a credit rating, enter “N/A” in Exhibit C-6.

C-7 Exhibit C-7 “Credit Report,” provide a copy of the applicant's current credit report from Experian, Dun and Bradstreet, or a similar organization. An applicant that provides an investment grade credit rating for Exhibit C-6 may enter “N/A” for Exhibit C-7.

- C-8 Exhibit C-8 "Bankruptcy Information,"** provide a list and description of any reorganizations, protection from creditors or any other form of bankruptcy filings made by the applicant, a parent or affiliate organization that guarantees the obligations of the applicant or any officer of the applicant in the current year or within the two most recent years preceding the application.
- C-9 Exhibit C-9 "Merger Information,"** provide a statement describing any dissolution or merger or acquisition of the applicant within the two most recent years preceding the application.
- C-10 Exhibit C-10 "Corporate Structure,"** provide a description of the applicant's corporate structure, not an internal organizational chart, including a graphical depiction of such structure, and a list of all affiliate and subsidiary companies that supply retail or wholesale electricity or natural gas to customers in North America. If the applicant is a stand-alone entity, then no graphical depiction is required and applicant may respond by stating that they are a stand-alone entity with no affiliate or subsidiary companies.

SECTION D – APPLICANT TECHNICAL CAPABILITY

PROVIDE THE FOLLOWING AS SEPARATE ATTACHMENTS AND LABEL AS INDICATED.

- D-1 Exhibit D-1 "Operations,"** provide a current written description of the operational nature of the applicant's business functions.
- D-2 Exhibit D-2 "Operations Expertise,"** given the operational nature of the applicant's business, provide evidence of the applicant's current experience and technical expertise in performing such operations.
- D-3 Exhibit D-3 "Key Technical Personnel,"** provide the names, titles, email addresses, telephone numbers, and background of key personnel involved in the operational aspects of the applicant's current business.

Applicant Signature and Title

Linda Miklos VP-Compliance

Sworn and subscribed before me this

26th day of March Month 2019 Year

Mary Claire Kelly

Signature of official administering oath

Mary Claire Kelly

Print Name and Title

My commission expires on

3-2-23

Commonwealth of Pennsylvania - Notary Seal
Mary Claire Kelly, Notary Public
Luzerne County
My commission expires March 2, 2023
Commission number 1083550
Member, Pennsylvania Association of Notaries



The Public Utilities Commission of Ohio

Competitive Retail Natural Gas Service
Affidavit Form
(Version 1.07)

In the Matter of the Application of)

_____)
for a Certificate or Renewal Certificate to Provide)
Competitive Retail Natural Gas Service in Ohio.)

Case No. - -GA-AGG

County of
State of

[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.
- (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 Section 4905.10 or Section 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 with the Public Utilities Commission of Ohio and its staff in 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 inform the Public Utilities Commission of Ohio of any material change to the information supplied in the certification or certification renewal application within 30 days of such material change, including any change in contact person for regulatory or emergency purposes or contact person for Staff use in investigating customer complaints.
- (8) Affiant further sayeth naught.

Affiant Signature & Title

SIGNED & AFFIRMED BEFORE ME

Sworn and subscribed before me this day of Month Year

Signature of Official Administering Oath

Print Name and Title

Commonwealth of Pennsylvania - Notary Seal
Mary Claire Kelly, Notary Public
Luzerne County
My commission expires March 2, 2023
Commission number 1083550
Member, Pennsylvania Association of Notaries

My commission expires on



Taylor has merged with Albireo Energy!



Exhibit A-14 Principle Officers

Scott Stiner – COO
330 Montage Mountain Road
Moosic, PA 18507
Ph: 570 414 0880

Bill Riordan – President
8 Pleasant Street, Building A
S. Natick, MA 01760
Ph: 617 429 9924

Matt Wheatley – Chief Revenue Officer
625 Main Street
Avoca, PA 18641
Ph: 908 552 9902

Rudi Miklosvary – VP Compliance
330 Montage Mountain Rd
Moosic, PA 18507
Ph: 917 420 0903



Taylor has merged with Albireo Energy



Exhibit A-15 Company History

Taylor Consulting and Contracting (Taylor) is a nationally recognized energy management firm with extensive experience in both regulated and deregulated utility markets. Taylor is also the pioneer of city-wide aggregation programs and currently manages aggregation programs in the city of Boston and Philadelphia among others. Taylor is one of the fastest growing energy management companies because of our unique approach that combines data management with technology and consulting expertise.

Taylor has successfully helped thousands of organizations across the country better manage their utility expenses through its proprietary products, *UtilityModule* and *EnergyAuctions*, in conjunction with its consulting expertise. Taylor specializes in helping organizations develop energy purchasing strategies that meet specific goals based on clearly defined objectives and market conditions. *EnergyAuctions* is an online platform where vetted suppliers compete for aggregated electric or natural gas load which delivers competitive pricing as the key outcome for our customers. *UtilityModule* is a state of the art, online software system that consolidates utility bills to track utility consumption and costs, and streamlines the budgeting process. Using these products and consultative services, Taylor develops bespoke procurement strategies to achieve our client's goals, and ensures our customers are always in the energy markets, ready and available to price their energy loads when market conditions present optimal buying opportunities.

Taylor has recently merged with Albireo Energy who provide building automation and integration solutions and energy services to commercial and institutional buildings nationally. Their solutions and services help building owners and managers improve efficiency and reduce operational costs while improving comfort for tenants. Through its operating divisions, Albireo Energy has a history of providing exceptional solutions to mission critical facilities such as data centers, labs, military installations, and hospitals. For more information, please visit www.AlbireoEnergy.com.

Since its inception in 2004, Taylor has a proven track record and unparalleled success in tracking utility expenses and recognizing exceptional procurement opportunities in deregulated markets.

Respectfully,

Rudi Miklosvary

VP – Compliance
330 Montage Mountain Rd
Moosic, PA 18507
Email: rmiklosvary@taylorcc.com
Ph: +1 917 420 0903



Taylor has merged with Albireo Energy!



Exhibit A-16 Articles of Incorporation

The contents of the originally filed documents has not changed since our initial application.



Taylor has merged with Albireo Energy!



Exhibit A-17 Secretary of State

Please see attached the certificate.



DATE:	DOCUMENT ID	DESCRIPTION	FILING	EXPED	PENALTY	CERT	COPY
03/09/2011	201106701208	REG. OF FOR. PROFIT LIM. LIAB. CO. (LFP)	125.00	.00	.00	.00	.00

Receipt

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

TAYLOR CONSULTING AND CONTRACTING, LLC
625 MAIN STREET
ATTN: KAREN TOMAINE, ESQ.
AVOCA, PA 18641

STATE OF OHIO CERTIFICATE

Ohio Secretary of State, Jon Husted

2002879

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

TAYLOR CONSULTING AND CONTRACTING, LLC

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

Document(s)

REG. OF FOR. PROFIT LIM. LIAB. CO.

Document No(s):

201106701208



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

Witness my hand and the seal of
the Secretary of State at Columbus,
Ohio this 4th day of March, A.D.
2011.

Jon Husted

Ohio Secretary of State

The Public Utilities Commission of Ohio
Ohio Competitive Retail Natural Gas Aggregator/Broker Certificate

Renewal

Issued pursuant to Case Number(s):

15-0650-GA-AGG

is

Ohio Competitive Retail Natural Gas Aggregator/Broker Certificate Number:

15-433G(2)

Granted to:

Taylor Consulting and Contracting, LLC

Whose office or principal place of business is located at:

625 Main Street, Avoca, PA 18641

And is hereby certified to provide:

Retail Natural Gas Aggregator/Broker Services

within the state of Ohio, for a two-year period.

Certification Effective:

May 3, 2017 through May 3, 2019

The certification of Ohio competitive retail natural gas aggregators/brokers is governed by Chapter 4901:1-27 of the Ohio Administrative Code and section 4929.20 of the Ohio Revised Code.

This Certificate is revocable if all of the conditions set forth in the aforementioned case(s) as well as those under law, are not met.

Certified entity is subject to all rules and regulations of the commission, now existing or hereafter promulgated.

Witness the seal of the Commission affixed at Columbus, Ohio

Dated: **May 4, 2017**

By Order of
The Public Utilities Commission of Ohio



Barcy F. McNeal, Secretary

Tanowa M. Troupe, Acting Secretary

Felecia D. Burdett, Acting Secretary



Taylor has merged with Albireo Energy!



Exhibit B-1 Jurisdiction of Operation

Taylor Consulting is a licensed to provide Electric and/or Natural Gas Brokerage/Aggregation services in all deregulated States including:

Connecticut
Delaware
Washington D.C.
Illinois
Maine
Maryland
Massachusetts
New Hampshire
New Jersey
Ohio
Pennsylvania
Rhode Island
Texas

Exhibit B-2 Experience and Plans

Taylor has over 30,000 utility accounts under management and serves customers across a wide variety of industries including but not limited to Schools, Colleges and Universities, Local and State Governments, Commercial Real Estate, Quick Serve Restaurants and small to medium enterprises.

Taylor is the market leader in developing buying aggregations to improve our customers buying power. Taylor has created the largest buying pools in several markets by brand or geography. Taylor helps customers enjoy the benefits of bulk purchasing power by placing them into aggregations. In Boston and Philadelphia, we run and manage large buying groups on behalf of the cities, but we also assemble aggregations for many other locations based on customer geography and usage patterns to provide optimal groups with similar characteristics.

Taylor uses proprietary technology platforms to optimize your energy and utility data management. These include *EnergyAuctions*, a reverse auction platform where suppliers compete for your business and *UtilityModule*, which manages data, sets alarms, creates budgets, and submits benchmarking usage. We find hidden efficiencies through your energy spend and become a champion for your business by:

1. **Collecting & Analyzing:** We acquire your utility and supplier data using our proprietary systems and analyze how to optimize your energy spend and pricing options. This overall strategic planning includes a detailed evaluation of your goals, current market conditions, evaluating risk tolerances, and working with your business to uncover the best solution that meets your needs
2. **Optimize and Compete:** As the energy markets trade to target levels, our experienced staff arrange and conduct competitive auctions, collect RFP's and evaluate suitable vendors. Our goal for your business is to uncover the most competitive price, with the best supplier, under acceptable contract terms, all of which are vital to ensuring you get the best deal available
3. **Manage & Repeat:** Once your decisions have been made, we keep you informed of continuing deliverables under our scope of service. Your account will always be monitored, be in purchasing mode and searching for the best available deals. Taylors process ensures that you do not need to fear missing an opportunity or better option as your needs change over time.

Exhibit B-3 Summary of Experience

Taylor is the market leader in developing buying aggregations to improve our customers buying power. Taylor has created the largest buying pools in several markets by brand or geography. Taylor helps customers enjoy the benefits of bulk purchasing power by placing them into aggregations. In the State of Ohio we have approximately 74 Natural Gas customers and 85 Electric customers. We have placed customers into Supply deals in Ohio's Natural Gas Choice programs including Columbia Gas, Dominion East, Duke Energy, and Vectren Energy.

Management Team

Scott Stiner

Scott serves as the Chief Operating Officer and was part of the original team that founded the Taylor business model. As the 'mad scientist' of the executives, Scott was responsible for the creation and building of *UtilityModule*, *EnergyAuctions*, *Energy Scorecard*, UM mobile app, and several other internal platforms. He is a graduate of Temple University (#goowls) and received his MBA from Mount St. Mary's College. Scott has founded several companies across technology, real estate and fashion, but always comes back to Taylor as his first.

Bill Riordan

Bill has served as President of Taylor since 2015 and has been part of the Taylor team since 2008. Bill spends most of his time working with clients to structure procurement programs that will help stabilize budgets and keep utility costs under control. He can often be found reviewing and or creating our clients' budgets in *UtilityModule*. Bill has both undergraduate and graduate degrees from Northeastern University. When not working or golfing, he can be found with his wife Beth at the Pavilion on the campus of Villanova University or the Wells Fargo Center in Philadelphia watching the Villanova Wildcats, his adopted school after sending both of his daughters there. Bill is also actively involved with Big Brothers Big Sisters.

Jon Hartnett

Jon has served as Vice President of Sales since the beginning of 2017. Based on Taylor's desire to do more with less, as SVP, Jon manages the business development efforts nationally, as well as the strategic relationships with our enterprise customers. Prior to Taylor, Jon was Senior Manager at EnerNOC and a Principal with Market Direct Energy. In both roles, he worked with Fortune 500 businesses to help customers define strategy and risk in various commodity markets. His work includes assessing opportunities for energy purchasing, demand management, energy monitoring, and regulatory risk. Jon holds a B.A in Business Management from Gettysburg College and

graduated from the Greater Boston Executive Program at MIT. When not at work with his Taylor family, Jon and his wife Liz are busy coaching or attending sporting events for their children, Charley and Rory.

Rudi Miklosvary

Rudi served as VP - Operations of Taylor in 2017 & 2018 leading the Supplier Relations, Account Management, Customer Service and Solar and Renewable departments. Rudi has developed a new function in the business as VP – Compliance and will be responsible for all licensing, supplier contracting, process documentation and RFP sales going into 2019. Rudi has been driving enterprise value with operational excellence and performance improvement for corporations and governments across the globe throughout his career. Prior to joining Taylor, Rudi lead the Solution Engineering team at EnerNOC, has launched new technology businesses in the US and supported the implementation of the Free Trade Agreement between Australia and the US. Rudi is a CEM, LEED-AP, has an MBA from the Australian Graduate School of Management and a Bachelor of Economics from LaTrobe University in Melbourne, Australia. Rudi is a father of twin boys (Alex and Blake) and an action sports enthusiast.

Matt Wheatley

Matt serves as Chief Revenue Officer and leads partnerships, acquisitions, new products and demand-based offerings and sales enablement as well as the strategic development of national and international sales channels. Matt joined Taylor from Centrica Plc, the Global 500 energy and energy services company best known for its Direct Energy brand (4 million residential and 240,000 business customers in the US & Canada), where he spent a decade. Matt held notable leadership roles with the Direct Energy Business and Centrica Business Solutions units, where he was formerly Vice President, Sales, working with business customers on various energy supply and demand side projects. Matt also has strong experience in mergers, acquisitions and finance with Grant Thornton, Roffe Swayne, and Exxon Mobil.

Matt holds a first-class honors BA in Business Studies and is a Fellow of the royally chartered Institute of Chartered Accountants in England and Wales and is a member of the Association of Chartered Accountants in the United States.



Taylor has merged with Albireo Energy!



Exhibit B-4 Disclosure of Liabilities

Taylor Consulting has not had any rulings, judgments contingent liabilities, revocations of authority, regulatory investigations, or any other matter that could adversely impact our financial or operational status or ability to provide service.



Taylor has merged with Albireo Energy!



Exhibit C-1 Annual Reports

Taylor Consulting is a private company and does generate Annual reports.



Taylor has merged with Albireo Energy



Exhibit C-2 SEC Filings

Taylor Consulting is a private company and does not file with the SEC.



Taylor has merged with Albireo Energy!



Exhibit C-3 Financial Statements

Please see attached the two most recent years audited financial statements. Please note, these statements are to be treated as Confidential.



Taylor has merged with Albireo Energy!



Exhibit C-4 Financial Arrangements

N/A Taylor Consulting is an Aggregator/Broker.



Taylor has merged with Albireo Energy!



Exhibit C-5 Forecasted Financial Statements

Forecasted income for our Natural Gas related business is expected as follows:

2019 - \$20,000

2020 - \$25,000

This includes all revenue flowing from deals in place, growth in sales presence in the State of Ohio and focus on cross sell activities with national clients as well as RFP responses to date.

Rudi Miklosvary – VP Compliance
330 Montage Mountain Road
Moosic, PA 18507
Ph: 917 420 0903
Email: rmiklosvary@taylorcc.com



Taylor has merged with Albireo Energy!



Exhibit C-6 Credit Rating

N/A



Taylor has merged with Albireo Energy!



Exhibit C-7 Credit Report

Taylor's Dun & Bradstreet # is 624 004 490

Attached is a current credit report from Experian

Subcode: 541583

Ordered: 03/26/2019 13:59:20 CST



Transaction Number: C303741344

Search Inquiry: taylor consulting and contracting/avoca/PA

Intelliscore PlusSM and BPR

Identifying Information

This information is the primary name and address for the business you inquired on. All data in this report pertains to the business.

TAYLOR CONSULTING & CONTRACTING, LLC

625 MAIN ST
AVOCA, PA 18641-1558
(570) 414-0880

Business Identification Number:

835786848

Years on File:

13 (FILE ESTABLISHED 12/2006)

Date of Incorporation:

04/07/2004

SIC

ENERGY CONSERVATION & MGMT CONSULTANTS -

Code:

8742

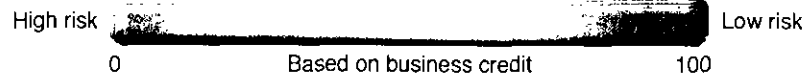
Tax ID:

55-0871893

Commercial Model

Intelliscore Plus predicts the likelihood of serious credit delinquency within the next 12 months based on business and/or owner/guarantor risk factors. Higher scores indicate lower risk.

Intelliscore Plus: 60



Factors Lowering the Score

- ▶ NUMBER OF CURRENT COMMERCIAL ACCOUNTS
- ▶ NUMBER OF RECENTLY ACTIVE COMMERCIAL ACCOUNTS

All Industry Risk Comparison

When compared to all businesses, 59% of businesses indicate a higher likelihood of severe delinquency than this business.

Based on your company's action or risk threshold, this business falls within the following category:

LOW-MEDIUM RISK

TOP

Business Information - TAYLOR CONSULTING & CONTRACTING, LLC

Business Credit Information

Current Days Beyond Terms (DBT):	0
Monthly average DBT:	0
Highest DBT previous 6 months:	0
Highest DBT previous 5 quarters:	0
Total continuous trades:	2
Current continuous trade balance:	\$600
Trade balance of all trades (4):	\$16,400
Average balance previous 5 quarters:	\$480
Highest credit amount extended: details	\$900
6 month balance range:	\$0 - \$0

Business Legal Filings and Collections

Bankruptcy filings:	0
Tax lien filings:	0
Judgment filings:	0
Total collections:	0
Sum of legal filings:	\$0
UCC filings: details (FILED 09/08)	1
Cautionary UCC filings present?	Yes**

** Cautionary UCC Filings include one or more of the following collateral:

Accounts, Accounts Receivables, Contract Rights, Hereafter Acquired Property, Inventory, Leases, Notes Receivable or Proceeds.

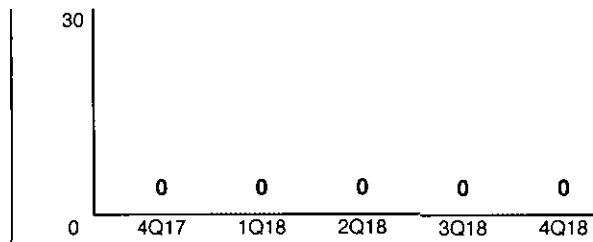
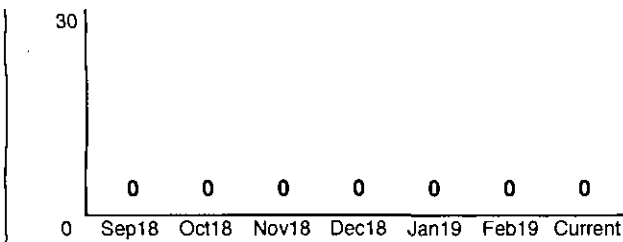
TOP

7 month DBT trends



Quarterly DBT trends (previous 5 quarters)





TOP

Trade Payment Information											
Trade Payment Experiences (Trade Lines With an (*) after date are newly reported)							Account Status Days Beyond Terms				
Business Category	Date Reported	Last Sale	Payment Terms	Recent High Credit	Balance	Cur	1-30	31-60	61-90	91+	Comments
AIR TRANS	01/2019	12/2018	OTHER	\$200	\$200	100%					
COMMUNICTN	02/2019		VARIED	\$900	\$400	100%					

TOP

Trade Payment Totals											
Trade Payment Experiences							Account Status Days Beyond Terms				
Type	Lines Reported	Recent High Credit	Balance	Cur	1-30	31-60	61-90	91+	Comments		
Continuously Reported	2	\$1,100	\$600	100%					DBT: 0		
Newly Reported	0								DBT:		
Trade Lines Totals	2	\$1,100	\$600	100%					DBT: 0		

TOP

Additional Payment Experiences											
Trade Payment Experiences (Trade Lines With an (*) after date are newly reported)							Account Status Days Beyond Terms				
Business Category	Date Reported	Last Sale	Payment Terms	Recent High Credit	Balance	Cur	1-30	31-60	61-90	91+	Comments
BANK CARD	02/2019		REVOLVE	\$32,700	\$15,800	100%					
BUS SERVCS	10/2018		VARIED	\$500	\$0						

TOP

Monthly Payment Trends											
Payment Trends Analysis ENERGY CONSERVATION & MGMT CONSULTANTS INDUSTRY SIC: 8742							Account Status Days Beyond Terms				
Date Reported	Cur	Industry DBT	Business DBT	Balance	Cur	1-30	31-60	61-90	91+		
CURRENT	N/A	N/A	0	\$600	100%						
FEB19	91%	4	0	\$600	100%						
JAN19	91%	4	0	\$900	100%						
DEC18	91%	4	0	\$400	100%						
NOV18	91%	4	0	\$500	100%						
OCT18	91%	4	0	\$500	100%						
SEP18	91%	4	0	\$700	100%						

TOP

Quarterly Payment Trends											
Payment History - Quarterly Averages							Account Status Days Beyond Terms				

Quarter	Months	DBT	Balance	Cur	1-30	31-60	61-90	91+
Q4 - 18	OCT - DEC	0	\$500	100%				
Q3 - 18	JUL - SEP	0	\$600	100%				
Q2 - 18	APR - JUN	0	\$500	100%				
Q1 - 18	JAN - MAR	0	\$400	100%				
Q4 - 17	OCT - DEC	0	\$400	100%				

TOP

UCC Profile

The UCC Filings are summarized and listed below

UCC Summary			Filings			
Date Range	Year	Cautionary UCCs**	Total Filed	Released / Termination	Continuous	Amended / Assigned
JAN - PRESENT	2019					
JUL - DEC	2018					
JAN - JUN	2018					
JUL - DEC	2017					
JAN - JUN	2017					
PRIOR TO JAN	2017	1	1	1	2	
Total		1	1	1	2	0

** Cautionary UCC Filings include one or more of the following collateral:

Accounts, Accounts Receivables, Contract Rights, Hereafter Acquired Property, Inventory, Leases, Notes Receivable or Proceeds.

UCC Filings

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UCC TERMINATED Date: 11/30/2018
Filing Number: 2018113001299
Original Filing Date: 09/30/2008
Original Filing Number: 2008093007
Original Filing State: PA
Jurisdiction: SEC OF STATE PA
Secured Party:
Collateral:

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UCC CONTINUED Date: 08/12/2013
Filing Number: 2013081202585
Original Filing Date: 01/01/2001
Original Filing Number: 2008093007
Original Filing State: PA
Jurisdiction: SEC OF STATE PA
Secured Party:
Collateral:

THE FOLLOWING DATA IS FOR INFORMATIONAL PURPOSES ONLY AND IS NOT AN OFFICIAL RECORD. CERTIFIED COPIES MAY BE OBTAINED FROM THE PENNSYLVANIA DEPARTMENT OF STATE. THE DATA IS CURRENT AS OF 03/26/2019.

UCC CONTINUED Date: 08/02/2018
Filing Number: 2018080200235
Original Filing Date: 09/30/2008
Original Filing Number: 2008093007
Original Filing State: PA
Jurisdiction: SEC OF STATE PA
Secured Party:
Collateral:

THE FOLLOWING DATA IS FOR INFORMATIONAL PURPOSES ONLY AND IS NOT AN OFFICIAL RECORD. CERTIFIED COPIES MAY BE OBTAINED FROM THE PENNSYLVANIA DEPARTMENT OF STATE. THE DATA IS CURRENT AS OF 03/26/2019.

UCC FILED Date: 09/30/2008
Filing Number: 2008093007976
Jurisdiction: SEC OF STATE PA
Secured Party: COMMUNITY BANK, N.A. D/B/A FIRST LIBERTY
NY OLEAN 14760 P.O.
Collateral: UNDEFINED, EQUIP, INVENTORY, HEREAFTER
AQUIRED PROP

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Company Background Information

Corporate Registration

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State of Origin: PA
Date of Incorporation: 04/07/2004
Current Status: Active
Business Type: Institutions - Profit
Charter Number: 3214253

Additional Company Background Information

Key Personnel

Principal KAREN TOMAINE, CEO

(s):
RUDI MIKLOSVARY, OFFICER
SCOTT STINER, MANAGER

Operating Information

Business Type: Institutions

Primary SIC Code: ENERGY CONSERVATION & MGMT CONSULT - 8742

Secondary SIC Code: BUSINESS CONSULTING SERVICES, NEC - 8748

Additional SIC Code: 5082 - 4911

Years in Business: 19

Number of Employees: 30

Sales: \$857,000

TOP 

CREDIT LIMIT: _____

TERMS: _____

COMMENTS: _____

SIGNATURE: _____

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End of report

1 of 1 report

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Taylor has merged with Albireo Energy!



Exhibit C-8 Bankruptcy Info

Taylor or its affiliates has not filed for bankruptcy or any protection from creditors in the current year, or within the past two years.



Taylor has merged with Albireo Energy!



Exhibit C-9 Merger Information

In November 2018 Taylor merged with Albireo Energy who provide building automation and integration solutions and energy services to commercial and institutional buildings nationally. Their solutions and services help building owners and managers improve efficiency and reduce operational costs while improving comfort for tenants. Through its operating divisions, Albireo Energy has a history of providing exceptional solutions to mission critical facilities such as data centers, labs, military installations, and hospitals. For more information, please visit www.AlbireoEnergy.com.

We are in the process of applying for independent licenses for Albireo Energy, LLC in the State of Ohio, and once granted will abandon the Taylor license and continue operations as Albireo Energy, LLC.



Taylor has merged with Albireo Energy!



Exhibit C-10 Corporate Structure

In November 2018 Taylor merged with Albireo Energy who provide building automation and integration solutions and energy services to commercial and institutional buildings nationally.

Both Taylor and Albireo Energy are Limited Liability Companies (LLC) Taylor is a registered Pennsylvania LLC and Albireo is a Michigan LLC.

Attached is our corporate structure that outlines how Taylor fits within the overall structure. Taylor is the only division that provide electric and natural gas brokerage services in deregulated states.

We are in the process of applying for independent licenses for Albireo Energy, LLC in the State of Ohio, and once granted will abandon the Taylor license and continue operations as Albireo Energy, LLC.



Albireo Ownership Structure

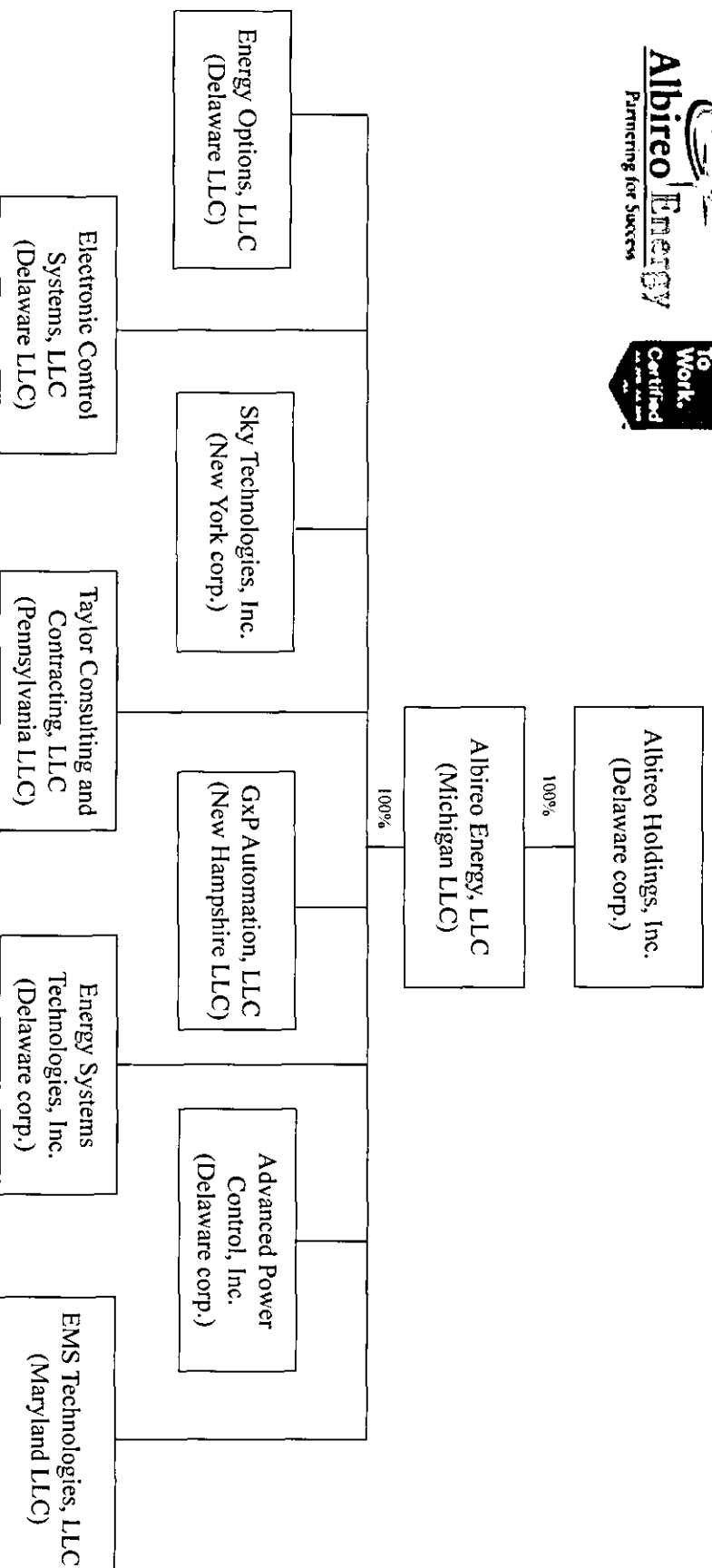


Exhibit D-1 Operations

Taylor is the market leader in developing buying aggregations to improve our customers buying power. Taylor has created some of the largest buying pools in several markets by brand or geography. Taylor helps customers enjoy the benefits of bulk purchasing power by placing them into aggregations. We run and manage buying groups based on customer geography and usage patterns to provide optimal groups with similar characteristics to Energy Suppliers.

Taylor uses proprietary technology platforms to optimize your energy and utility data management. These include *EnergyAuctions*, a reverse auction platform where suppliers compete for your business *and UtilityModule*, which manages data, sets alarms, creates budgets, and submits benchmarking usage. We find hidden efficiencies through your energy spend and become a champion for your business by:

1. **Collecting & Analyzing:** We acquire your utility and supplier data using our proprietary systems and analyze how to optimize your energy spend and pricing options. This overall strategic planning includes a detailed evaluation of your goals, current market conditions, evaluating risk tolerances, and working with your business to uncover the best solution that meets your needs
2. **Optimize and Compete:** As the energy markets trade to target levels, our experienced staff arrange and conduct competitive auctions, collect RFP's and evaluate suitable vendors. Our goal for your business is to uncover the most competitive price, with the best supplier, under acceptable contract terms, all of which are vital to ensuring you get the best deal available
3. **Manage & Repeat:** Once your decisions have been made, we keep you informed of continuing deliverables under our scope of service. Your account will always be monitored, be in purchasing mode and searching for the best available deals. Taylors process ensures that you do not need to fear missing an opportunity or better option as your needs change over time.

Exhibit D-2 Operations Expertise

Taylor is the market leader in developing buying aggregations to improve our customers buying power and has been in business since 2004. We have over 30,000 utility accounts under management and serve customers across a wide variety of industries including but not limited to Schools, Colleges and Universities, Local and State Governments, Commercial Real Estate, Quick Serve Restaurants and small to medium enterprises.

We use proprietary technology platforms to optimize our customers energy and utility data management. These include *EnergyAuctions*, a reverse auction platform where suppliers compete for your business and *UtilityModule*, which manages data, sets alarms, creates budgets, and submits benchmarking usage. We find hidden efficiencies through our customers energy spend by:

1. **Collecting & Analyzing:** We acquire customer utility and supplier data using our proprietary systems and analyze how to optimize their energy spend and pricing options. This overall strategic planning includes a detailed evaluation of goals, current market conditions, evaluating risk tolerances, and working with each business to uncover the best solution that meets their needs
2. **Optimize and Compete:** As the energy markets trade to target levels, our experienced staff arrange and conduct competitive auctions, collect RFP's and evaluate suitable vendors. Our goal is to uncover the most competitive price, with the best supplier, under acceptable contract terms, all of which are vital to ensuring our customers get the best deal available to them
3. **Manage & Repeat:** Once decisions have been made, we keep our customers informed of continuing deliverables under our scope of service. Each account will always be monitored, be in purchasing mode and searching for the best available deals. Taylors process ensures that our customers do not need to fear missing an opportunity or better option as your needs change over time.

Management Team

Scott Stiner

Scott serves as the Chief Operating Officer and was part of the original team that founded the Taylor business model. As the 'mad scientist' of the executives, Scott was responsible for the creation and building of *UtilityModule*, *EnergyAuctions*, *Energy Scorecard*, UM mobile app, and several other internal platforms.

He is a graduate of Temple University (#goowls) and received his MBA from Mount St. Mary's College.

Scott has founded several companies across technology, real estate and fashion, but always comes back to Taylor as his first.

Bill Riordan

Bill has served as President of Taylor since 2015 and has been part of the Taylor team since 2008. Bill spends most of his time working with clients to structure procurement programs that will help stabilize budgets and keep utility costs under control. He can often be found reviewing and or creating our clients' budgets in *UtilityModule*. Bill has both undergraduate and graduate degrees from Northeastern University. When not working or golfing, he can be found with his wife Beth at the Pavilion on the campus of Villanova University or the Wells Fargo Center in Philadelphia watching the Villanova Wildcats, his adopted school after sending both of his daughters there. Bill is also actively involved with Big Brothers Big Sisters.

Jon Hartnett

Jon has served as Vice President of Sales since the beginning of 2017. Based on Taylor's desire to do more with less, as SVP, Jon manages the business development efforts nationally, as well as the strategic relationships with our enterprise customers. Prior to Taylor, Jon was Senior Manager at EnerNOC and a Principal with Market Direct Energy. In both roles, he worked with Fortune 500 businesses to help customers define strategy and risk in various commodity markets. His work includes assessing opportunities for energy purchasing, demand management, energy monitoring, and regulatory risk. Jon holds a B.A in Business Management from Gettysburg College and graduated from the Greater Boston Executive Program at MIT. When not at work with his Taylor family, Jon and his wife Liz are busy coaching or attending sporting events for their children, Charley and Rory.

Rudi Miklosvary

Rudi served as VP - Operations of Taylor in 2017 & 2018 leading the Supplier Relations, Account Management, Customer Service and Solar and Renewable departments. Rudi has developed a new function in the business as VP – Compliance and will be responsible for all licensing, supplier contracting, process documentation and RFP sales going into 2019. Rudi has been driving enterprise value with operational excellence and performance improvement for corporations and governments across the globe throughout his career. Prior to joining Taylor, Rudi lead the Solution Engineering team at EnerNOC, has launched new technology businesses in the US and supported the implementation of the Free Trade Agreement between Australia and the US. Rudi is a CEM, LEED-AP, has an MBA from the Australian Graduate School of Management and a Bachelor of Economics from LaTrobe University in Melbourne, Australia. Rudi is a father of twin boys (Alex and Blake) and an action sports enthusiast.

Matt Wheatley

Matt serves as Chief Revenue Officer and leads partnerships, acquisitions, new products and demand-based offerings and sales enablement as well as the strategic development of national and international sales channels. Matt joined Taylor from Centrica Plc, the Global 500 energy and energy services company best known for its Direct Energy brand (4 million residential and 240,000 business customers in the US & Canada), where he spent a decade. Matt held notable leadership roles with the Direct Energy Business and Centrica Business Solutions units, where he



Taylor has merged with Albireo Energy



was formerly Vice President, Sales, working with business customers on various energy supply and demand side projects. Matt holds a first-class honors BA in Business Studies and is a Fellow of the royally chartered Institute of Chartered Accountants in England and Wales and is a member of the Association of Chartered Accountants in the United States.

Exhibit D-3 Key Technical Personal

Management Team

Scott Stiner - COO

330 Montage Mountain Road

Moosic, PA 18507

Ph: 855 521 8780

Email: Sstiner@taylorcc.com

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S. Natick, MA 01760

Ph: 617 429 9924

Email: briordan@taylorcc.com

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Ph: 855 521 8780

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Matt Wheatley

625 Main Street

Avoca, PA 18641

Ph: 855 521 8780

Email: mwheatley@taylorcc.com

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