



19-2029-EL-AGG

PUCO USE ONLY		
Date Received	Case Number	Version
	- EL-AGG	May 2016

INITIAL CERTIFICATION APPLICATION FOR ELECTRIC AGGREGATORS/ POWER BROKERS

Please print or type all required information. Identify all attachments with an exhibit label and title (Example: Exhibit A-12 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 input information directly onto the form.
You may also download the form, by saving it to your local disk, for later use.

A. APPLICANT INFORMATION

A-1 Applicant intends to be certified as: (check all that apply)



Power Broker



Aggregator

A-2 Applicant's legal name, address, telephone number and web site address

Legal Name Taurus Advisory Group LLCAddress 27 Lawrence Rd, Madison, NJ 07940Telephone # 855.557.3440Web site address (if any) www.taurusadvisorygroup.com

A-3 List name, address, telephone number and web site address under which Applicant will do business in Ohio

Legal Name Taurus Advisory Group LLCAddress 27 Lawrence Rd, Madison, NJ 07940Telephone # 855.557.3440Web site address (if any) www.taurusadvisorygroup.com

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

Taurus Advisory Group LLC

A-5 Contact person for regulatory or emergency matters

Name Nathan BurroughsTitle Executive Manager

This is to certify that the foregoing information is an accurate and complete reproduction of a document delivered in the regular course of business.
Technician AGG Date Processed 11/12/19

2019 NOV 12 PM 3:46

PUCO

Business address 27 Lawrence Rd, Madison, NJ 07940

Telephone # 855.557.3440

Fax # 908.934.9384

E-mail address nburroughs@taurusag.com

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

Name Nicholas Gerome

Title Managing Director

Business address 27 Lawrence Rd, Madison, NJ 07940

Telephone # 855.557.3440

Fax # 908.934.9384

E-mail address ngerome@taurusag.com

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

Customer Service address 27 Lawrence Rd, Madison, NJ 07940

Toll-free Telephone # 855.557.3440

Fax # 908.934.9384

E-mail address info@taurusag.com

A-8 Applicant's federal employer identification number # 82-2818400

A-9 Applicant's form of ownership (check one)

☐ Sole Proprietorship

☐ Partnership

☐ Limited Liability Partnership (LLP)

☒ Limited Liability Company (LLC)

☐ Corporation

☐ Other

A-10 (Check all that apply) Identify each electric distribution utility certified territory in which the applicant intends to provide service, including identification of each customer class that the applicant intends to serve, for example, residential, small commercial, mercantile commercial, and industrial. (A mercantile customer, as defined in (A) (19) of Section 4928.01 of the Revised Code, is a commercial customer who consumes more than 700,000 kWh/year or is part of a national account in one or more states).

☒ **First Energy**

☒ Ohio Edison

☒ Toledo Edison

☒ Cleveland Electric Illuminating

☒ Duke Energy

☒ Monongahela Power

☒ American Electric Power

☒ Ohio Power

☒ Columbus Southern Power

☒ Dayton Power and Light

☒ Residential

☒ Residential

☒ Residential

☒ Residential

☒ Residential

☒ Residential

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☒ Mercantile

☒ Mercantile

☒ Industrial

☒ Industrial

☒ Industrial

☒ Industrial

☒ Industrial

☒ Industrial

☒ Industrial

☒ Industrial

☒ Industrial

- A-11** Provide the approximate start date that the applicant proposes to begin delivering services
Upon approval - on or around 12/7/18

PROVIDE THE FOLLOWING AS SEPARATE ATTACHMENTS AND LABEL AS INDICATED:

- A-12** **Exhibit A-12 "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-13** **Exhibit A-13 "Company History,"** provide a concise description of the applicant's company history and principal business interests.
- A-14** **Exhibit A-14 "Articles of Incorporation and Bylaws,"** if applicable, provide the articles of incorporation filed with the state or jurisdiction in which the Applicant is incorporated and any amendments thereto.
- A-15** **Exhibit A-15 "Secretary of State,"** provide evidence that the applicant has registered with the Ohio Secretary of the State.

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 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 or wholesale electric services including aggregation services.
- B-2** **Exhibit B-2 "Experience & Plans,"** provide a 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 4928.10 of the Revised Code.

B-3 **Exhibit B-3 "Summary of Experience,"** provide a concise summary of the applicant's experience in providing aggregation service(s) including contracting with customers to combine electric load and representing customers in the purchase of retail electric services. (e.g. number and types of customers served, utility service areas, amount of load, etc.).

B-4 **Exhibit B-4 "Disclosure of Liabilities and Investigations,"** provide a description of all existing, pending or past rulings, judgments, contingent liabilities, revocation 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.

B-5 Disclose whether the applicant, a predecessor of the applicant, or any principal officer of the applicant have ever been convicted or held liable for fraud or for violation of any consumer protection or antitrust laws within the past five years.

☒ 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 Disclose whether the applicant or a predecessor of the applicant has had any certification, license, or application to provide retail or wholesale electric service including aggregation service denied, curtailed, suspended, revoked, or cancelled within the past two years.

☒ 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.

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 in 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 the applicant does not have such filings, it may submit those of its parent company. An applicant may submit a current link to the filings or provide them in paper form. If the applicant does not have such filings, then the applicant may indicate in Exhibit C-2 that 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 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:

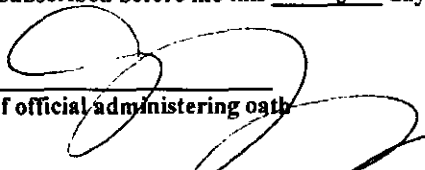
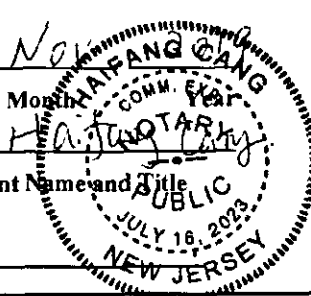
1. The applicant itself stating that it is investment grade rated by Moody’s, Standard & Poor’s or Fitch and provide evidence of rating from the rating agencies.
2. Have a parent company or third party that is investment grade rated by Moody’s, Standard & Poor’s or Fitch guarantee the financial obligations 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 **ELECTRIC 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 credit rating as reported by two of the following organizations: Duff & Phelps, Dun and Bradstreet Information Services, Fitch IBCA, Moody's Investors Service, Standard & Poors, 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 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 credit report from Experion, 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.

 Executive Manager
Signature of Applicant & Title

Sworn and subscribed before me this 6 day of Nov
Month Year

Signature of official administering oath
Print Name and Title
My commission expires on _____


AFFIDAVIT

State of New Jersey :

Madison ss.
(Town)

County of Morris :

Nathan Burroughs, Affiant, being duly sworn/affirmed according to law, deposes and says that:

He/She is the Executive Manager (Office of Affiant) of Taurus Advisory Group LLC (Name of Applicant);

That he/she is authorized to and does make this affidavit for said Applicant,

1. The Applicant herein, attests under penalty of false statement that all statements made in the application for certification are true and complete and that it will amend its application while the application is pending if any substantial changes occur regarding the information provided in the application.
2. The Applicant herein, attests it will timely file an annual report with the Public Utilities Commission of Ohio of its intrastate gross receipts, gross earnings, and sales of kilowatt-hours of electricity pursuant to Division (A) of Section 4905.10, Division (A) of Section 4911.18, and Division (F) of Section 4928.06 of the Revised Code.
3. The Applicant herein, attests that it will timely pay any assessments made pursuant to Sections 4905.10, 4911.18, or Division F of Section 4928.06 of the Revised Code.
4. The Applicant herein, attests that it will comply with all Public Utilities Commission of Ohio rules or orders as adopted pursuant to Chapter 4928 of the Revised Code.
5. The Applicant herein, attests that it 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 herein, attests that it will fully comply with Section 4928.09 of the Revised Code regarding consent to the jurisdiction of Ohio Courts and the service of process.
7. The Applicant herein, attests that it will comply with all state and/or federal rules and regulations concerning consumer protection, the environment, and advertising/promotions.
8. The Applicant herein, attests that it 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 herein, attests that it 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, the Applicant herein, attests that 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. (Only applicable if pertains to the services the Applicant is offering)

11. The Applicant herein, attests that it will inform the Commission 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 customer complaints.

That the facts above set forth are true and correct 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.

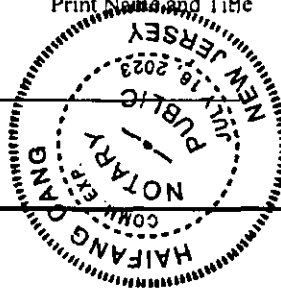
[Signature] Executive Manager
Signature of Affiant & Title

Sworn and subscribed before me this 7 day of Nov, 2019
Month Year

[Signature]
Signature of official administering oath

Haiifang Cang
Print Name and Title

My commission expires on _____



EXHIBITS

- Exhibit A-12 "Principal Officers, Directors & Partners"
- Exhibit A-13 "Company History"
- Exhibit A-14 "Articles of Incorporation and Bylaws"
- Exhibit A-15 "Secretary of State"
- Exhibit B-1 "Jurisdictions of Operation"
- Exhibit B-2 "Experience & Plans"
- Exhibit B-3 "Summary of Experience"
- Exhibit B-4 "Disclosure of Liabilities and Investigations"
- Exhibit C-1 "Annual Reports"
- Exhibit C-2 "SEC Filings"
- Exhibit C-3 "Financial Statements"
- Exhibit C-4 "Financial Arrangements"
- Exhibit C-5 "Forecasted Financial Statements"
- Exhibit C-6 "Credit Rating"
- Exhibit C-7 "Credit Report"
- Exhibit C-8 "Bankruptcy Information"
- Exhibit C-9 "Merger Information"
- Exhibit C-10 "Corporate Structure"



A-12 – Principal Officers, Directors and Partners

Owner/CEO – Martin Benante

Address – 5908 Burnham Rd., Naples, FL 34119

Phone – 201-240-4905

Executive Manager – Nathan Burroughs

Address – 27 Lawrence Rd, Madison, NJ 07940

Cell – 908-763-2077

Office - 855.557.3440

Managing Director – Nicholas Gerome

Address – 15555 North Park Blvd, Cleveland Heights Ohio 44118

Cell – 216.543.5100

Office – 855.557.3440



A-13 – Company History

Applicant was previously licensed as an electricity broker/aggregator in OH until 11/2/19 but license lapsed due to unforeseen personal circumstances for key company administrators. Company still maintains in good standing license to broker natural gas in OH as well as electricity in eight other jurisdictions. The Company was created in September of 2017 and has been providing high quality energy brokering/consultative services since that time. Key personnel have a combined 60 years' experience in the energy sector – including industrial support of energy sector and production, in addition to intermediary brokering the sale and purchase of energy supply agreements.



A-14 – Articles of Formation

See Attached

NEW JERSEY DEPARTMENT OF THE TREASURY
DIVISION OF REVENUE AND ENTERPRISE SERVICES

CERTIFICATE OF FORMATION
TAURUS ADVISORY GROUP LLC
0450201129

The above-named DOMESTIC LIMITED LIABILITY COMPANY was duly filed in accordance with New Jersey State Law on 09/18/2017 and was assigned identification number 0450201129. Following are the articles that constitute its original certificate.

1. **Name:**
TAURUS ADVISORY GROUP LLC
2. **Registered Agent:**
MARTIN BENANTE
3. **Registered Office:**
27 LAWRENCE ROAD
MADISON, NEW JERSEY 07940
4. **Business Purpose:**
CONSULTATION FOR: ENERGY PROCUREMENT AND MANAGEMENT, GRANT AND INCENTIVES,
GOVERNMENT RELATIONS, ORGANIZATIONAL SUSTAINABILITY
5. **Effective Date of this Filing is:**
09/18/2017
6. **Members/Managers:**
MARTIN BENANTE
27 LAWRENCE ROAD
MADISON, NEW JERSEY 07940
7. **Main Business Address:**
27 LAWRENCE ROAD
MADISON, NEW JERSEY 07940

Signatures:

MARTIN BENANTE
AUTHORIZED REPRESENTATIVE



Certificate Number : 4040225411

Verify this certificate online at

https://www1.state.nj.us/TYTR_StandingCertJSP/Verify_Cert.jsp

IN TESTIMONY WHEREOF, I have
hereunto set my hand and
affixed my Official Seal
18th day of September, 2017

A handwritten signature in black ink, appearing to read "Ford M. Scudder".

Ford M. Scudder
State Treasurer



A-15 – Secretary of State

See Attached



DATE	DOCUMENT ID	DESCRIPTION	FILING	EXPED	CERT	COPY
09/28/2017	201726900984	REGISTRATION OF FOREIGN FOR PROFIT LLC (LFP)	99.00	0.00	0.00	0.00

Receipt

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

TAURUS ADVISORY GROUP LLC
27 LAWRENCE RD
MADISON, NJ 07940

STATE OF OHIO CERTIFICATE

Ohio Secretary of State, Jon Husted
4077833

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

TAURUS ADVISORY GROUP LLC

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

Document(s)

REGISTRATION OF FOREIGN FOR PROFIT LLC

Effective Date: 09/26/2017

Document No(s):

201726900984



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
28th day of September, A.D. 2017.

Jon Husted
Ohio Secretary of State



Form 533B Prescribed by:

JON HUSTED
OHIO SECRETARY OF STATE

Toll Free: (877) SOS-FILE (877-787-3453)
Central Ohio: (614) 466-3810

www.OhioSecretaryofState.gov
busserv@OhioSecretaryofState.gov

File online or for more information: www.OH-BusinessCentral.com

Mail this form to one of the following:

Regular Filing (non expedite)
P.O. Box 670
Columbus, OH 43210

Expedite Filing (Two business day processing time.
Requires an additional \$100.00)
P.O. Box 1300
Columbus, OH 43216

Registration of a Foreign Limited Liability Company

Filing Fee: \$99

Form Must Be Typed

CHECK ONLY ONE (1) BOX

(1) ☒ Registration of a Foreign For-Profit Limited Liability Company
(106-LFA)
ORC 1705

Jurisdiction of Formation

NJ USA

State Country

Date of Formation

9/18/2017

(2) ☐ Registration of a Foreign Nonprofit
Limited Liability Company
(108-LFA)
ORC 1705

Jurisdiction of Formation

State Country

Date of Formation

Name of Limited Liability Company in its jurisdiction of formation:

TAURUS ADVISORY GROUP LLC

Name under which the foreign limited liability company desires to transact business in Ohio (if different from its name in its jurisdiction of formation) is:

Name must include one of the following words or abbreviations: "limited liability company," "limited," "LLC," "L.L.C.," "Ltd.," or "Ltd."

The address to which interested persons may direct requests for copies of the limited liability company's operating agreement, bylaws, or other charter documents of the company is:

NATHAN BURROUGHS

Name

27 LAWRENCE RD

Mailing Address

MADISON

NJ

USA

07940

City

State

Country

ZIP Code

The limited liability company hereby appoints the following as its agent upon whom process against the limited liability company may be served in the state of Ohio. The name and complete address of the agent is

NICHOLAS GEROME

Name

15555 N PARK BLVD

Mailing Address

CLEVELAND HEIGHTS

City

OH

State

44118

ZIP Code

The limited liability company irrevocably consents to service of process on the agent listed above as long as the authority of the agent continues, and to service of process upon the Ohio Secretary of State if:

- a. an agent is not appointed, or
- b. an agent is appointed but the authority of that agent has been revoked, or
- c. the agent cannot be found or served after the exercise of reasonable diligence.

By signing and submitting this form to the Ohio Secretary of State, the undersigned hereby certifies that he or she has the requisite authority to execute this document.

Required

Must be signed by an authorized representative.

NICK GEROME

Signature

If authorized representative is an individual, then they must sign in the "signature" box and print their name in the "Print Name" box.

By (if applicable)

Print Name

If authorized representative is a business entity, not an individual, then please print the business name in the "signature" box, an authorized representative of the business entity must sign in the "By" box and print their name in the "Print Name" box.

Signature

By (if applicable)

Print Name

Signature

By (if applicable)

Print Name



B-1 - Jurisdiction and Operation

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



B-2 – Experience and Plans

Applicant has over 14 years of experience acting as an intermediary in the sale and purchase of energy supply agreements in every deregulated market in the U.S. and Canada (including Ohio). Applicant will continue to leverage this experience to offer more personal attention for the Ohio energy end user at a cheaper cost.

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

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

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

B-3 – Summary of Experience

Martin Benante

Served as Chairman and CEO of multi-billion-dollar corporation developing and supplying highly engineered products to industrial and energy markets.

Responsibilities included:

- Acquiring, streamlining operations, and increasing efficiency of industry-relative small and mid-sized companies
- Developing directives on the corporate intelligence surrounding energy markets and energy production, especially nuclear and natural gas

Nicholas Gerome:

Prior to coming to Taurus, Mr. Gerome oversaw the day-to-day sourcing and operations of two leading energy procurement advisory firms for over 10 years and have executed over 30,000 energy supply agreements.

Responsibilities included:

- Tracked and reported historical and forward commodity settlement prices, managed and generated all company market reports, facilitated market calls and webinars, provided customer/contract specific data to support hedging recommendations
- Facilitated all bidding by generating RFP's and including the appropriate documentation and historical usage information to maximize participation and price action as well as ensuring a competitive and even environment
- Made purchase recommendations that reflect specific client objectives supported by historical price trends, current market conditions, specific account profile pattern, and general economic data
 - Executed, confirmed, and recorded customer supply agreements in every deregulated ISO as well as natural gas and Green-e certified RECS across North America
 - Performed revenue reporting, monitored post contractual activity, and commission tracking



Nathan Burroughs

Prior to his time at Taurus, he served in manager/director role for two consulting/advisory firms over the course of 8 years. Responsibilities included:

- Ensuring compliance with organizational, local, State, and Federal rules, regulations, ordinances and programs
- Managing over \$80 million worth of client projects and contracts
- Assisting financial staff of clients with budgets ranging from \$50 million to \$580 million
- Garnering public and private funds for clients in support of sustainability initiatives, including comprehensive audits, retrofits, community planning, green space development, energy management, solar installations, and community outreach



B-4 – Disclosure of Liabilities and Investigations

Not Applicable



C- 1 – Annual Reports

Not Applicable



C-2 – SEC Filings

Not applicable. Applicant is not required to file with the SEC.



C-4 – Financial Arrangements

Not applicable



C-6 – Credit Rating

Not applicable



C-8 – Bankruptcy Information

Not applicable



C-9 – Merger Information

Not applicable



C-10 – Corporate Structure

We are a stand-alone entity with no affiliate or subsidiary companies.