



DIS Case Number: 17-2078-GA-AGG

Section A: Application Information

A-1. Provider type:

☒ Retail Natural Gas
Broker

☐ Retail Natural Gas
Aggregator

☐ Retail Natural Gas
Marketer

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

Legal Name: Blue Line Marketing, LLC, d/b/a
Blueline Energy

Country: United States

Phone: 6302885004

**Extension (if
applicable):**

Street: 700 Commerce Dr., Suite 500

Website (if any): www.bluelineenergy.biz

City: Oak Brook

Province/State: IL

Postal Code: 60523

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
Blueline Energy	DBA	700 Commerce Dr., Suite 500 Oak Brook, IL 60523	Yes	Link
Blue Line Marketing, LLC	Official Name	700 Commerce Dr., Suite 500 Oak Brook, IL 60523	Yes	Link

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
Blueline Energy	DBA	700 Commerce Dr., Suite 500 Oak Brook, IL 60523	Yes	Link



A-5. Contact person for regulatory matters

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

Michael Wood
700 Commerce Drive Suite 500
Oak Brook, IL 60523
US
regulatory@bluelineenergy.biz
6302885004

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

Phone: 8883396178	Extension (if applicable):	Country: United States
Fax: (630) 288-4601	Extension (if applicable):	Street: 700 Commerce Dr., Suite 500
Email: regulatory@bluelineenergy.biz		City: Oak Brook Postal Code: 60523
		Province/State: IL

A-8. Applicant's federal employer identification number

47-1307206

A-9. Applicant's form of ownership

Form of ownership: Limited Liability Company (LLC)

A-10. Identify current or proposed service areas

Identify each service area in which the applicant is currently providing service or intends to provide service and identify each customer class that the applicant is currently serving or intends to serve.

Service area selection

Columbia Gas of Ohio
 Dominion Energy Ohio
 Duke Energy Ohio
 Vectren Energy Delivery of Ohio

Class of customer selection

Industrial
 Small Commercial
 Large Commercial

A-11. Start date

Indicate the approximate start date the applicant began/will begin offering services: 11-02-2017

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
Michael Wood	regulatory@bluelineenergy.biz	President	700 Commerce Drive Suite 500 Oak Brook, IL 60523 US
Bobcat Holdings, LLC	regulatory@bluelineenergy.biz	Managing Member	1209 Orange St. Wilmington, DE 19801 US

A-13. Company history

Blue Line Marketing, LLC was created in July of 2014. Since formation, Blue Line has provided telemarketing services to a single electric service provider in various states. In 2017, Blue Line entered into the broker/marketing field in Illinois, Ohio and Pennsylvania to sell retail electric service and natural gas service for alternative retail electric and natural gas suppliers pursuant to contractual agreements with those suppliers.

A-14. Secretary of State

Secretary of State Link: <https://businesssearch.ohiosos.gov?=businessDetails/4069050>

A-15. Proof of Ohio Employee and Office

Provide proof of an Ohio Office and Employee in accordance with Section 4929.22 of the Ohio Revised Code. List the designated Ohio employee's name, Ohio office address, telephone number and web site address

Employee Name: CT Corporation System CT Corporation System
4400 Easton Commons Way, Suite 125
Columbus, OH 43219
US
ct-statecommunications@wolterskluwer.com
6146211919

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: Blue Line Marketing, LLC is currently licensed to provide retail electric and natural gas services in Ohio, Illinois, and Pennsylvania.

B-2. Experience and plans

Describe the applicant's experience in providing the service(s) for which it is applying (e.g., number and type of customers served, utility service areas, amount of load, etc.). Include the plan for contracting with customers, providing contracted services, providing billing statements and responding to customer inquiries and complaints in accordance with Commission rules adopted pursuant to Sections 4928.10 and/or 4929.22 of the Ohio Revised Code.

Application Experience and Plan Description: Blue Line Marketing, LLC was created in July of 2014. Since formation, Blue Line has provided telemarketing services to a single electric service provider in various states. In 2017, Blue Line entered into the broker/marketing field in Illinois,



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Ohio and Pennsylvania to sell retail electric and natural gas service for alternative retail electric and natural gas suppliers pursuant to contractual agreements with those suppliers.

Blue Line's President, Michael Wood, has over 27 years of managerial and operational experience. From 2013 to the present, Mike has been a consultant for a multi-state alternative retail electric and natural gas supplier for residential and commercial customers. In this position, he has structured a third-party capital program, backed by electric contract cash flows, which continues to fund customer acquisition and growth. He makes an ongoing assessment and provides recommendations regarding the organizational structure, strategy, capital structure, and managerial and financial reporting. Mike is well versed in all areas of the retail electric and gas supply business, including, but not limited to marketing, contracting with customers, customer service, and obtaining supply. Mike joined Blue Line Marketing, LLC when it was formed in July of 2014, and is currently its President. Mike's extensive experience with the electric and natural gas industry carries over to his work with Blue Line. Mike handles all the typical duties held by the President of any company.

CONTRACTING WITH CUSTOMERS

Blue Line will clearly disclose all terms and conditions of the agreement with the suppliers it contracts with to the customer and seeks to provide competitively priced natural gas and electric products through those suppliers. Blue Line will comply with all rules and laws set forth by the Public Utilities Commission.

PROVIDING CONTRACTED SERVICES

Blue Line does not and will not directly provide the contracted natural gas services to customers, but will work with suppliers to arrange such services to customers.

PROVIDING BILLING STATEMENTS

Blue Line intends to provide natural gas brokering services and will charge brokerage fees to be paid by the suppliers.

RESPONDING TO CUSTOMER INQUIRIES AND COMPLAINTS

Blue Line strives to provide outstanding customer service and the lowest possible rates to customers. Blue Line strives to provide a live person to answer the telephone, and if messages are left, strives to return calls as quickly as possible. Small and large customers receive the same high level of service.

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..



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



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Provide copies of the applicant's two most recent years of audited financial statements, including a balance sheet, income statement, and cash flow statement. If audited financial statements are not available, provide officer certified financial statements. If the applicant has not been in business long enough to satisfy this requirement, provide audited or officer certified financial statements covering the life of the business. If the applicant does not have a balance sheet, income statement, and cash flow statement, the applicant may provide a copy of its two most recent years of tax returns with **social security numbers and bank account numbers redacted**.

If the applicant is unable to meet the requirement for two years of financial statements, the Staff reviewer may request additional financial information.

Preferred to file this information confidentially

C-3. Forecasted financial statements

Provide two years of forecasted income statements **based solely on the applicant's anticipated business activities in the state of Ohio**.

Include the following information with the forecast: a list of assumptions used to generate the forecast; a statement indicating that the forecast is based solely on Ohio business activities only; and the name, address, email address, and telephone number of the preparer of the forecast.

The forecast may be in one of two acceptable formats: 1) an annual format that includes the current year and the two years succeeding the current year; or 2) a monthly format showing 24 consecutive months following the month of filing this application broken down into two 12-month periods with totals for revenues, expenses, and projected net incomes for both periods. Please show revenues, expenses, and net income (revenues minus total expenses) that is expected to be earned and incurred in **business activities only in the state of Ohio** for those periods.

If the applicant is filing for both an electric certificate and a natural gas certificate, please provide a separate and distinct forecast for revenues and expenses representing Ohio electric business activities in the application for the electric certificate and another forecast representing Ohio natural gas business activities in the application for the natural gas certificate.

Preferred to file confidentially

C-4. Credit rating



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Provide a credit opinion disclosing the applicant's credit rating as reported by at least one of the following ratings agencies: Moody's Investors Service, Standard & Poor's Financial Services, Fitch Ratings or the National Association of Insurance Commissioners. If the applicant does not have its own credit ratings, substitute the credit ratings of a parent or an affiliate organization and submit a statement signed by a principal officer of the applicant's parent or affiliate organization that guarantees the obligations of the applicant. If an applicant or its parent does not have such a credit rating, enter 'Not Rated'.

This does not apply

C-5. Credit report

Provide a copy of the applicant's credit report from Experian, Equifax, TransUnion, Dun and Bradstreet or a similar credit reporting organization. If the applicant is a newly formed entity with no credit report, then provide a personal credit report for the principal owner of the entity seeking certification. At a minimum, the credit report must show summary information and an overall credit score. **Bank/credit account numbers and highly sensitive identification information must be redacted.** If the applicant provides an acceptable credit rating(s) in response to C-4, then the applicant may select 'This does not apply' and provide a response in the box below stating that a credit rating(s) was provided in response to C-4.

Preferred to file this information confidentially

C-6. Bankruptcy information

Within the previous 24 months, have any of the following filed for reorganization, protection from creditors or any other form of bankruptcy?

- Applicant
- Parent company of the applicant
- Affiliate company that guarantees the financial obligations of the applicant
- Any owner or officer of the applicant

No

C-7. Merger information

Is the applicant currently involved in any dissolution, merger or acquisition activity, or otherwise participated in such activities within the previous 24 months?

No



C-8. Corporate structure

Provide a graphical depiction of the applicant's corporate structure. Do not provide an internal organizational chart. The graphical depiction should include all parent holding companies, subsidiaries and affiliates as well as a list of all affiliate and subsidiary companies that supply retail or wholesale electricity or natural gas to customers in North America. If the applicant is a stand-alone entity, then no graphical depiction is required, and the applicant may respond by stating that it is a stand-alone entity with no affiliate or subsidiary companies.

Stand-alone entity with no affiliate or subsidiary companies

Section D: Applicant Technical Capacity

D-1. Operations

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

Operations Description: Blue Line Marketing, LLC was created in July of 2014. Since formation, Blue Line has provided telemarketing services to a single electric and natural gas service provider in various states. In 2017, Blue Line entered into the broker/marketing field in Illinois, Ohio and Pennsylvania to sell retail electric and natural gas service for alternative retail electric and natural gas suppliers pursuant to contractual agreements with those suppliers.

Since 2017, Blue Line has sold natural gas service for 2 retail natural gas suppliers serving 20 small commercial, large commercial, and industrial users in Ohio, Illinois, and Pennsylvania totaling over 500,000 therms.

D-2. Operations Expertise & Key Technical Personnel

Given the operational nature of the applicant's business, provide evidence of the applicant's experience and technical expertise in performing such operations. Include the names, titles, e-mail addresses, and background of key personnel involved in the operations of the applicant's business.



Operations Expertise & Personnel Description: Operations Expertise -

Blue Line Marketing, LLC was created in July of 2014. Since formation, Blue Line has provided telemarketing services to a single electric and natural gas service provider in various states. In 2017, Blue Line entered into the broker/marketing field in Illinois, Ohio and Pennsylvania to sell retail electric and natural gas service for alternative retail electric and natural gas suppliers pursuant to contractual agreements with those suppliers.

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Key Technical Personnel -

NAME	TITLE	ADDRESS	PHONE NUMBER	EMAIL
Michael S. Wood	President	700 Commerce Dr.	(727) 203-8902	mike@bluelineenergy.biz

Suite 500
Oak Brook, IL 60523

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Public Utilities
Commission

Application Attachments

Competitive Retail Natural Gas Service Affidavit

County of DuPage :

State of Illinois :

Michael S. Wood, Affiant, being duly sworn/affirmed, hereby states that:

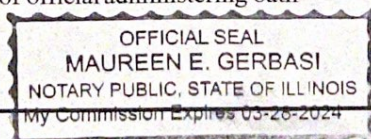
1. The information provided within the certification or certification renewal application and supporting information is complete, true, and accurate to the best knowledge of affiant, and that it will amend its application while it is pending if any substantial changes occur regarding the information provided.
2. The applicant will timely file an annual report of its intrastate gross receipts and sales of hundred cubic feet of natural gas pursuant to Sections 4905.10(A), 4911.18(A), and 4929.23(B), Ohio Revised Code.
3. The applicant will timely pay any assessment made pursuant to Sections 4905.10 and 4911.18(A), Ohio Revised Code.
4. Applicant will comply with all applicable rules and orders adopted by the Public Utilities Commission of Ohio pursuant to Title 49, Ohio Revised Code.
5. Applicant will cooperate fully with the Public Utilities Commission of Ohio and its staff on any utility matter including the investigation of any consumer complaint regarding any service offered or provided by the applicant.
6. Applicant will comply with Section 4929.21, Ohio Revised Code, regarding consent to the jurisdiction of the Ohio courts and the service of process.
7. Applicant will comply with all state and/or federal rules and regulations concerning consumer protection, the environment, and advertising/promotions.
8. Applicant will inform the Public Utilities Commission of Ohio of any material change to the information supplied in the application within 30 days of such material change, including any change in contact person for regulatory purposes or contact person for Staff use in investigating consumer complaints.
9. The facts set forth above are true and accurate to the best of his/her knowledge, information, and belief and that he/she expects said applicant to be able to prove the same at any hearing hereof.
10. Affiant further sayeth naught.

MSW President
Signature of Affiant & Title

Sworn and subscribed before me this 27th day of September, 2021
Month Year

Maureen E. Gerbasi
Signature of official administering oath

Maureen E. Gerbasi, Admin Asst.
Print Name and Title



My commission expires on March 28, 2024

This foregoing document was electronically filed with the Public Utilities

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in

Case No(s). 17-2078-GA-AGG

Summary: In the Matter of the Application of Blue Line Marketing dba Blueline Energy