BEFORE THE PUBLIC UTILITIES COMMISSION OF OHIO

In the Matter of the Application of Ohio Power Company for Authority to Establish a Standard Service Offer Pursuant to Section 4928.143, Revised Code, in the Form of an Electric Security Plan	)))))	Case No. 23-23-EL-SSO
In the Matter of the Application of Ohio Power Company for Approval of Certain Accounting Authority	)))	Case No. 23-24-EL-AAM

AEP OHIO'S MEMORANDUM CONTRA
ONE ENERGY ENTERPRISES INC.'S INTERLOCUTORY APPEAL

Under Ohio Administrative Code ("OAC") 4901-1-15, Ohio Power Company ("AEP Ohio") submits this Memorandum Contra the August 21, 2023 Interlocutory Appeal of One Energy Enterprises Inc. ("One Energy"), which sought an immediate interlocutory appeal of the Attorney Examiner's August 16, 2023 Entry ("Entry") insofar as it denied One Energy's July 31, 2023 "Motion to Establish a Reasonable Protective Agreement." For the following reasons, One Energy's interlocutory appeal should be dismissed or denied.

I. One Energy's Appeal Should Be Dismissed Because One Energy Does Not Satisfy Any of the Grounds for an "Immediate" Interlocutory Appeal Under OAC 4901-1-15(A).

One Energy styles its filing as an "Interlocutory Appeal" – not a request to *certify* an interlocutory appeal – and One Energy expressly relies on OAC 4901-1-15(A), governing "immediate interlocutory appeals," as the authority on which its filing is based. At no point in its filing does One Energy request that the Attorney Examiner certify an interlocutory appeal to the Commission under OAC 4901-1-15(B). One Energy, however, is not entitled to bring an "immediate" interlocutory appeal under the Commission's rules, and therefore its appeal should be dismissed.

Rule 4901-1-15(A) enumerates four grounds on which a party may bring an immediate interlocutory appeal to the Commission, and One Energy satisfies none of these. One Energy states (Appeal at 4) that it is relying on the first of the grounds enumerated in OAC 4901-1-15(A), which provides that a party may bring an immediate interlocutory of an order that "[g]rants a motion to compel discovery or denies a motion for a protective order." OAC 4901-1-15(A)(1). With no discussion or analysis, One Energy (at 4) baldly claims that the August 19, 2023 Entry satisfies this provision because "One Energy sought a reasonable protective agreement, and the Entry expressly denied that request." That reasoning is flawed.

As One Energy admits (at 4), One Energy did not seek a "protective order," but rather a so-called "reasonable protective agreement." A protective order is filed by a party "from whom discovery is sought," OAC 4901-1-24(A), and the purpose of the protective order is to protect this party from "annoyance, embarrassment, oppression, or undue burden or expense," among other things, *id.* Here, One Energy is not the "party from whom discovery is sought" – that party is AEP Ohio. Instead, One Energy is the party who is *seeking* discovery.

One Energy did not file a motion to compel under OAC 4901-1-23, but even if its motion "for a reasonable protective order" were construed as a motion to compel, the Attorney Examiner ruled *against* One Energy, denying One Energy's request to require AEP Ohio to produce discovery according to the unjust protective agreement that One Energy proposed. Critically, a *denial* of a motion to compel is not one of the grounds on which a party may bring an immediate interlocutory appeal. *See* OAC 4901-1-15(A)(1) (permitting an immediate interlocutory appeal of a motion to compel only where an order "*[g]rants* a motion to compel" (emphasis added)).

Holding that One Energy is not entitled to an immediate interlocutory appeal would uphold the purpose of OAC 4901-1-15(A). By limiting an immediate interlocutory appeal to situations where a protective order is *granted* or a protective order is *denied*, OAC 4901-1-15(A)(1) is clearly meant to protect a party against whom discovery is sought from having to disclose that discovery without a ruling from the full Commission. The reason for this is straightforward: Once a party is compelled to produce discovery, the harm from that production cannot be undone – the bell cannot be unrung. Here, as discussed above, the party against whom discovery is sought – the party who is trying to prevent the bell from being rung – is AEP Ohio, not One Energy. AEP Ohio is seeking to prevent the disclosure of competitively sensitive information to One Energy employees who are engaged in competitive business activities. One Energy, by contrast, is trying to ring the bell; it is trying to force AEP Ohio to disclose the competitively sensitive information according to One Energy's preferred terms. Nothing in OAC 4901-1-15(A) suggests that a party seeking discovery is entitled to immediate and automatic review by the full Commission. Instead, a party seeking discovery must ask for certification of an interlocutory appeal under OAC 4901-1-24(B), and the party must show, among other things, that the denial of the request for discovery "presents a new or novel question of interpretation, law, or policy" and that "an immediate determination by the commission is needed to prevent the likelihood of undue prejudice or expense to one or more of the parties, should the commission ultimately reverse the ruling in question." OAC 4901-1-24(B). As noted above, One Energy has not sought certification, and its filing does not attempt to satisfy the certification standard in any way. AEP Ohio has worked out all discovery disputes with One Energy and there is no information One Energy seeks that has not been produced – but One Energy seeks to use the information produced in a way that would harm AEP Ohio and its customers. Accordingly, One Energy is not entitled to an interlocutory appeal under OAC 4901-1-15, and its appeal should be dismissed.

II. One Energy's Grounds for Overturning the Entry Are Meritless.

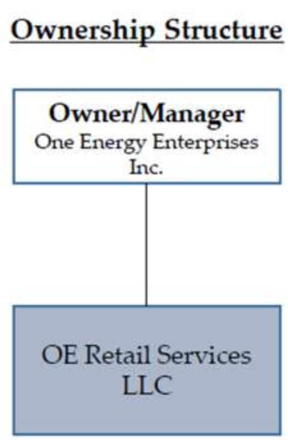
Even if One Energy were entitled to an interlocutory appeal (it is not, as discussed above), the Attorney Examiner's August 19, 2023 Entry was well-reasoned and correct, and One Energy presents no grounds for reversal.

A. One Energy's Attempt to Draw a Distinction Between One Energy Enterprises and Its CRES Subsidiary Is Meritless Given Its Admission that One Energy Enterprises and Mr. Kent "Manage" the CRES Subsidiary.

One Energy's main argument (at 4) is its assertion that the Attorney Examiner relied on "inaccurate facts" because "One Energy is not a CRES provider, and Mr. Kent is not an employee of a CRES provider." (Jereme Kent is One Energy's chosen witness and the person to whom One Energy wants to give access to confidential information.) According to One Energy (*id.*), the Attorney Examiner should have focused on the fact that the "One Energy Enterprises Inc. is the intervening party," and One Energy Enterprises is not a CRES provider. Instead, One Energy Enterprises' *subsidiaries* are CRES providers, and they "are not parties to the case." (*Id.*)

This factual distinction between parent and subsidiary is profoundly misleading and formalistic, and it is easily dismissed. By its own reckoning, One Energy Enterprises is a corporation made up of multiple corporate entities. One of those entities is a wholly owned subsidiary called "OE Retail Services LLC," which does business under the name "One Energy Analytics." OE Retail Services LLC is registered with the Commission as a CRES – specifically, as an electric aggregator, electric power broker, retail natural gas aggregator, and retail natural gas broker. (*See* April 15, 2022 Competitive Retail Electric Service (CRES) Provider Application of OE Retail Services LLC, Case No. 20-0654-EL-AGG (attached hereto as Attachment A); *see also* September 24, 2021 Competitive Retail Electric Service (CRES) Provider Application of OE Retail Services LLC, Case No. 21-0963-EL-AGG (attached hereto as Attachment B).)

The CRES provider applications submitted by One Energy Analytics (which are attached to this Memorandum Contra) demonstrate that there is no meaningful distinction between "One Energy Enterprises Inc." and "OE Retail Services LLC" when it comes to protecting competitively sensitive information. The electric CRES application unmistakably states that OE Retail Services LLC "is a member-managed limited liability company and *managed by One Energy Enterprises Inc.*, the sole member." (*See* Attachment A, Exhibit A-12 (emphasis added).) It further states that although "OE Retail Services LLC has no direct officers or directors," One Energy Enterprises Inc. (its sole managing member) "is *managed by Jereme Kent*." (*Id.* (emphasis added).) It then provides Mr. Kent's title and address. (*Id.*) The gas CRES application is even clearer, containing the similar language as the electric application and also adding that One Energy "is managed by one member, who at present is Jereme Kent." (Attachment B, Exhibit A-12.) The applications even offer a helpful diagram showing the corporate relationship:



(*See* Attachment A, page following Exhibit C-5.)

If those clear statements leave any doubt that One Energy Enterprises and Mr. Kent are vitally engaged in the activities of the CRES subsidiary (they do not), other parts of the applications confirm that fact. For instance, in response to a question about the CRES subsidiary's "experience and plans," the applications tout the "experience" of "Mr. Kent":

> *One Energy Enterprises Inc. is the sole member of OE Retail Services LLC. Jereme Kent is the CEO and General Manager of One Energy Enterprises Inc. and has considerable experience in the electric industry*. One Energy Enterprises Inc., as of the date of the filing of this application, installs, owns, and operates behind-the-meter wind turbines that are self-certified as qualifying facilities (QFs) under PURPA. These facilities, which total 40.5 MWs of installed facilities, power manufacturing and industrial facilities in the State of Ohio. One Energy has been offering these services to manufacturing and industrial users in the State of Ohio since 2011. As such, *Mr. Kent has considerable experience in the electric industry*. Additionally, One Energy Enterprises Inc. has recently added an analytics team that has over 25 years of combined experience in the retail energy industry, including natural gas brokerage service experience.

(Attachment A, Exhibit B-2 (emphasis added); *accord* Attachment B, Exhibit B-2.) Further, in response to a question about the CRES subsidiary's "operations," the applications expressly refer to the operations of the "parent company" and conflate the "One Energy" corporate structure, stating that "OE Retail Services LLC's *parent company and its affiliates (One Energy)* have offered extensive electric services in Ohio for nearly a decade." (Attachment A, Exhibit D-1 (emphasis added).) The application exhibits are even captioned with a corporate logo – "One Energy, wind for industry" – that draws no distinction among corporate entities. (*See id.*)

All this publicly available information from the CRES applications shows that One Energy Enterprises Inc. (the "intervening party," as One Energy puts it) and Jereme Kent (One Energy's witness) are intimately involved in competitive business in general and running OE Retail Services LLC, the CRES subsidiary. It is incredible that One Energy (at 4) would attempt to draw a distinction among the One Energy corporate entities and focus on the fact that One Energy Enterprises Inc. is the "intervening party" when One Energy Enterprises Inc. and Jereme Kent are named as the *managers* of the CRES subsidiary. Those who, by their own admission, "manage" a

CRES obviously should not have access to competitively sensitive information that they can use to gain a competitive advantage.[1]

B. One Energy's Protective Agreement Is Inadequate Because There Is No Way for Mr. Kent or Others to Forget Competitively Sensitive Information Once They See It.

One Energy's next argument (at 5) is that even if Mr. Kent and others were involved in competitive activities, One Energy's proposed protective agreement would be sufficient to ensure that they will not use competitively sensitive information improperly. One Energy does not cite or discuss any part of its proposed protective agreement in making this argument, however, so it is impossible to respond to this claim and it should be disregarded. In any event, the Attorney Examiner already correctly held that there is no way to ensure that Mr. Kent or others will refrain from using confidential information to gain a competitive advantage. As the Attorney Examiner stated, "Even with a protective agreement in place, it would be impossible for any individual to completely forget or disregard the type of information requested by One Energy in discovery." Entry ¶ 16. That point is manifestly correct – once confidential information is released, there is no way to unring the bell. One Energy does not engage with the Attorney Examiner's reasoning or make any effort to show how its proposed protective order would address the Attorney Examiner's concern.

[1] If, as One Energy misleadingly implies, Mr. Kent is not involved in the activities of the One Energy CRES subsidiary (he obviously is involved, as shown above), AEP Ohio's proposed protective agreement would account for this. AEP Ohio's protective agreement states that One Energy employees may view competitively sensitive information so long as they are "not engaged in competitive pricing, sales, or marketing" or otherwise "involved with the CRES-related business activities." If Mr. Kent were truly not involved in competitive activities, this provision would be acceptable to One Energy. The fact that One Energy is fighting this reasonable provision shows that Mr. Kent is, in fact, highly involved in CRES-related business activities.

C. AEP Ohio's Status as an Electric Distribution Utility Does Not Change the Fact that It Possesses Information that CRES Providers Could Use to Gain an Unfair Competitive Advantage.

One Energy (at 5-6) also criticizes the Entry on the ground that "AEP Ohio is an electric distribution utility" and "cannot lawfully engage in providing competitive retail electric services." Taken to its illogical conclusion, One Energy appears to argue that because AEP Ohio is a regulated electric distribution utility it does not have ability to possess competitively sensitive information. This generalization and over simplification misses the point entirely, in addition to ignoring abundant precedent protecting competitively-sensitive information held by EDUs like AEP Ohio. Even if EDUs do not provide competitive retail electric services, they still possess considerable confidential information that could cause competitive harm to the EDUs themselves and others if disclosed without appropriate protection. For instance, as AEP Ohio noted in its Memorandum Contra One Energy's motion, One Energy's requests for production (which AEP Ohio rightly objected to) sought information about AEP Ohio customers, such as One Energy's request for all "applications . . . to AEP Ohio's new business portal for data centers or digital currency mining since 1/1/2020" (OEE-RPD-01-009), and its request for all "applications . . . to AEP Ohio's new business portal for projects greater than 10W since 1/1/2020" (OEE-RPD-01-010). This kind of information would obviously give One Energy an unfair competitive advantage over other competitive providers if Mr. Kent or anyone else involved in CRES activities were to have access to this detailed customer information. If permitted, the interests of both AEP Ohio and its customers would be harmed.

As AEP Ohio has noted repeatedly, moreover, One Energy has still not identified what confidential information it wants Mr. Kent to have access to, even though One Energy received detailed discovery responses from AEP Ohio that identified the nature of the information AEP Ohio has marked as confidential. Nor has One Energy ever claimed that AEP Ohio has incorrectly marked any discovery response as confidential. Therefore, One Energy's argument that AEP Ohio "is an electric distribution utility" is a red herring. This dispute is not about whether AEP Ohio possesses competitively sensitive information (it does, and One Energy has never challenged any confidentiality designations) or whether AEP Ohio has fulfilled its discovery obligations. The dispute is about whether Mr. Kent should have access to competitively sensitive information. Due to his intimate involvement with CRES activities (shown from One Energy's own statements outlined above), he should not have access to any information that he could use to gain a competitive advantage.

D. One Energy May Still Submit Testimony from Internal Witnesses Such as Mr. Kent, and Indeed It Has Already Done So.

As it did in its Motion, One Energy again argues (at 6) that the "practical result" of the Entry is that "intervening parties are forced to hire third parties" to serve as witnesses. That is simply false. AEP Ohio's proposed protective order, which was endorsed by the Entry, *does* permit parties to use internal witnesses, as evidenced by the fact that Mr. Kent *is One Energy's witnesses and has already filed testimony*. Moreover, AEP Ohio's proposed protective order even allows an internal witness to view competitively sensitive information, so long as the internal witness is not involved in "CRES-related activities." This is a reasonable distinction, as the Entry correctly found (¶ 16), because competitive information is, by definition, information that an entity could use to gain an unfair competitive advantage. A CRES provider (or, here, a corporate parent that admittedly "manages" the CRES provider) should not be able to make an end-round on reasonable protections against disclosing competitively sensitive information simply by naming one of its employees as a witness. Moreover, AEP Ohio already agreed to permit in-house counsel to review the highest level of confidential information – RESTRICTED ACCESS CONFIDENTIAL.

E. The Attorney Examiner Considered One Energy's Reply, Which in Any Event Raised No New Arguments Worth Noting.

One Energy argues (at 6-7) that the "attorney examiner failed to adequately take into consideration One Energy's Reply" because the "Entry was docketed just thirty-one (31) minutes after One Energy's Reply." This argument can be dismissed out of hand. Contrary to One Energy's claims, its reply offered no new arguments, and the supposed "factual inaccuracies" concerning Mr. Kent's role in CRES activities were, in fact, entirely baseless. (As described in detail above, by their own admission, One Energy Enterprises and Mr. Kent are deeply involved in competitive activities, and so there was no "factual inaccuracy.") The Attorney Examiner is under no obligation to affirmatively state that it reviewed the reply prior to issuing the order, and One Energy's contrary claim is speculative and baseless.

F. One Energy's Appeal Ignores Two Grounds on Which the Entry Was Based – Namely, that All Other Competitive Intervenors Agreed to the Protective Order and that Mr. Kent Has Already Filed His Testimony.

Remarkably, One Energy ignored two grounds on which the Entry was based, either one of which is sufficient to reject One Energy's interlocutory appeal. First, the Entry (¶ 16) stated that the "attorney examiner finds AEP Ohio's representation that all other competitive intervenors have agreed to these provisions to be telling." One Energy's interlocutory appeal did not challenge that statement or provide any reason to distinguish itself from the other competitive intervenors.

Second, the Entry (¶ 16) keyed in on the fact that "Mr. Kent has already prefiled his direct testimony in this case." As AEP Ohio explained in its Memorandum Contra One Energy's Motion, Mr. Kent was able to make all his points without the use of confidential material, and One Energy still has made no effort to explain how access to confidential material at this late date would somehow change Mr. Kent's testimony. One Energy baldly claims that it needs Mr. Kent to access confidential material because "counsel must work with its experts in preparing for hearing and engaging in cross-examination," but it offers no detail to support this claim. It does not say what confidential information it is referring to or how Mr. Kent accessing this material would aid counsel in preparing for cross-examination. The Attorney Examiner correctly recognized (Entry ¶ 16) that "[t]o the extent that review of the protected documents is needed for cross-examination purposes, AEP Ohio's revised agreement allows for counsel, whether in-house or outside, to view all levels of confidential information."

III. Conclusion

For the foregoing reasons, One Energy's appeal should be dismissed because One Energy does not satisfy any of the grounds for an "immediate" interlocutory appeal under OAC 4901-1-15(A). Alternatively, the appeal should be denied because One Energy states no grounds on which to overturn the Attorney Examiner's Entry.

Respectfully submitted,

<u>/s/ Steven T. Nourse</u>
Steven T. Nourse (0046705)
Counsel of Record
Michael J. Schuler (0082390)
American Electric Power Service Corporation
1 Riverside Plaza, 29th Floor
Columbus, Ohio 43215-2373
Telephone: (614) 716-1608 (Nourse)
Telephone: (614) 716-2928 (Schuler)
Facsimile: (614) 716-2950
stnourse@aep.com
mjschuler@aep.com

Eric B. Gallon (0071465)
Porter Wright Morris & Arthur
Huntington Center
41 S. High Street Columbus, Ohio 43215
Telephone: (614) 227-2190
egallon@porterwright.com

Christopher L. Miller
Ice Miller LLP
250 West Street
Columbus, Ohio 43215
Telephone: (614) 462-2339
Fax: (614) 222-4707
christopher.miller@icemiller.com

Matthew S. McKenzie (0091875)
M.S. McKenzie Ltd.
P.O. Box 12075
Columbus, Ohio 43212
Telephone: (614) 592-6425
matthew@msmckenzieltd.com

CERTIFICATE OF SERVICE

In accordance with Rule 4901-1-05, Ohio Administrative Code, the PUCO's e-filing system will electronically serve notice of the filing of this document upon the following parties. In addition, I hereby certify that a service copy was sent by, or on behalf of, the undersigned counsel to the following parties of record this 28th day of August 2023, via e-mail:

*/s/ Steven T. Nourse*___
Steven T. Nourse (0046705)

Email Service:
mpritchard@mcneeslaw.com;
awalke@mcneeslaw.com;
William.michael@occ.ohio.gov;
angela.obrien@occ.ohio.gov;
connor.semple@occ.ohio.gov;
Alana.Noward@occ.ohio.gov;
Bojko@carpenterlipps.com;

Easley@carpenterlipps.com;
rkelter@elpc.org;
emcconnell@elpc.org;
paul@carpenterlipps.com;
wilcox@carpenterlipps.com;
dproano@bakerlaw.com;
ahaque@bakerlaw.com;
eprouty@bakerlaw.com;
pwillison@bakerlaw.com;
ctavenor@theOEC.org;
knordstrom@theOEC.org;
mkurtz@BKLlawfirm.com;
kboehm@BKLlawfirm.com;
jkylercohn@BKLlawfirm.com;
Alex.Kronauer@walmart.com;
cgrundmann@spilmanlaw.com;
dwilliamson@spilmanlaw.com;
slee@spilmanlaw.com;
sean.mcglone@ohiohospitals.org;
dparram@brickergraydon.com;
rmains@brickergraydon.com;
jlaskey@norris-law.com;
rdove@keglerbrown.com;
nbobb@keglerbrown.com;
Evan.Betterton@igs.com;
mnugent@igsenergy.com;
Stacie.Cathcart@igs.com;
jlang@calfee.com;
dromig@armadapower.com;
trent@hubaydougherty.com;
brian.gibbs@nationwideenergypartners.com;
dborchers@brickergraydon.com;
KHerrnstein@brickergraydon.com;
ktreadway@oneenergyllc.com;
jdunn@oneenergyllc.com;
little@litohio.com;
hogan@litohio.com;
cynthia.brady@constellation.com;
jesse.rodriguez@constellation.com;
mjsettineri@vorys.com;
glpetrucci@vorys.com;
aasanyal@vorys.com;
Fdarr2019@gmail.com;
dstinson@bricker.com;
gkrassen@nopec.org;
cpirik@dickinsonwright.com;
todonnell@dickinsonwright.com;

kshimp@dickinsonwright.com;
werner.margard@ohioattorneygeneral.gov
ambrosia.wilson@OhioAGO.gov;
ashley.wnek@OhioAGO.gov

Ohio | Public Utilities Commission

Competitive Retail Electric Service (CRES) Provider Application

Instructions for Competitive Retail Electric Service (CRES) Providers

I. **Where to file:** Applications can be completed and submitted via the PUCO Community. Paper applications, an original plus two copies, can be mailed to: Public Utilities Commission of Ohio, Docketing Division, 180 East Broad Street, Columbus Ohio 43215-3793.

II. **Case Number:** If Applicant is applying for any combination of broker and/or aggregator, the application must be filed with an "AGG" purpose code. If the application includes marketer and/or retail electric generation provider, then the purpose code must be "CRS".

III. **Renewal applications:** A certificate is valid for two years from the date of issuance. An application for renewal should be filed in the Applicant's existing case number 30-90 days prior to the expiration date printed on the certificate.

IV. **Confidentiality**: An applicant may file financial statement, forecasted financial statements, financial arrangements, credit ratings, and credit reports under seal. Confidentiality for other items must be requested in a motion filed in the docket. Motions for protective orders must be filed in accordance with Ohio Administrative Code 4901-1-24 and 4901:1-24.

V. **Commission approval process**: The Commission approval process begins when the Commission's Docketing Division receives and time/date stamps the application. An incomplete application may be suspended or rejected. An application that has been suspended an incomplete may cause delay in certification. The Commission may approve, suspend, or deny an application within 30 days. If no action is taken, the application is deemed automatically approved on the 31st day after the official filing date. Upon approval, the Commission will issue a numbered certificate that specifies the service(s) for which the applicant is certified and the dates for which the certificate is valid.

VI. **Material change**: Providers are required to notify the Commission of any changes to the information provided in its most recent application within thirty days of the change.

VII. **Governing law**: The certification and renewal of competitive providers is governed by Chapters 4901:1-21, 4901:1-24, 4901:1-27, 4901:1-28, and 4901:1-29 of the Ohio Administrative Code, and Sections 4928.08 and 4929.20 of the Ohio Revised Code.

VIII. **Questions**: Questions regarding the application should be directed to CRES@puco.ohio.gov or CRNGS@puco.ohio.gov.

This page is for informational purposes and should not be filed with the application.

Ohio | Public Utilities Commission

Competitive Retail Electric Service (CRES)
Provider Application

Case Number: 20 - 0654 -EL- AGG

Please complete all information. Identify all attachments with a label and title (example: Exhibit C-2 Financial Statements). For paper filing, you can mail the original and two complete copies to the Public Utilities Commission of Ohio, Docketing Division, 180 East Broad Street, Columbus, Ohio 43215-3793.

A. Application Information

A-1. Provider Type.

Select the competitive retail electric service (CRES) provider type(s) for which the applicant is seeking certification. Please note you can select more than one.

Aggregator	Power Broker	Power Marketer	Retail Electric Generation Provider
☑	☑	☐	☐

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

Provide the name and contact information of the business entity.

Legal Name: OE Retail Services LLC

Street Address: 12385 Township Road 215

City: Findlay State: OH Zip: 45840

Telephone: 877-298-5853 Website: ____

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: OE Retail Services LLC

Street Address: 12385 Township Road 215

City: Findlay State: OH Zip: 45840

Telephone: 877-298-5853 Website: ____

A-4. Names under which the applicant does business in North America.

Provide all business names the applicant uses in North America. You do not need to include the names provided in A-2 and A-3.

Name(s): One Energy Analytics

A-5. Contact person for regulatory matters.

Name: James D. Dunn Title: Senior Counsel
Street Address: 12385 Township Road 215
City: Findlay State: OH Zip: 45840
Telephone: 419-379-8552 Email: jdunn@oneenergyllc.com

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

Name: James D. Dunn Title: Senior Counsel
Street Address: 12385 Township Road 215
City: Findlay State: OH Zip: 45840
Telephone: 419-379-8552 Email: jdunn@oneenergyllc.com

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

Street Address: PO BOX 894
City: Findlay State: OH Zip: 45840
Toll-free Telephone: 877-298-5853 Email: oeretail@oneenergyllc.com

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

FEIN: 833272737

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

☐ Sole Proprietorship
☐ Limited Liability Partnership (LLP)
☐ Corporation
☐ Partnership
☑ Limited Liability Company (LLC)
Other: ______________________

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:

☑ AES Ohio
☑ American Electric Power (AEP Ohio)
☑ Duke Energy Ohio
☑ FirstEnergy – Cleveland Electric Illuminating

FirstEnergy – Ohio Edison	FirstEnergy – Toledo Edison
☑	☑

Class of customer selection:

Commercial	Industrial	Mercantile	Residential
☑	☑	☑	☐

A-11. Start Date.

Indicate the approximate start date the applicant began/will begin offering services.

Date: 06/01/2020

A-12. Principal officers, directors and partners.

Please provide an attachment for all contacts that should be listed as an officer, director or partner.

A-13. Company history.

Provide an attachment with a concise description of the applicant's company history and principal business interests.

A-14. Secretary of State.

Provide evidence that the applicant is currently registered with the Ohio Secretary of State.

B. Managerial Capability

Provide a response or attachment for each of the sections below.

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.

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.

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? If yes, attach a document detailing the information.

Yes ☐ 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? If yes, attach a document detailing the information.

Yes ☐ No ☑

B-6. Environmental disclosure.

This section is only applicable if power marketer or retail electric generation provider has been selected in A-1.

Provide a detailed description of how the applicant intends to determine its generation resource mix and environmental characteristics, including air emissions and radioactive waste. Include the annual projection methodology and the proposed approach to compiling the quarterly actual environmental disclosure data. See 4901:1-21-09 of the Ohio Administrative Code for additional details of this requirement.

C. Financial Capability

Provide a response or attachment for each of the sections below.

C-1. Financial reporting.

Provide a current link to the most recent Form 10-K filed with the Securities and Exchange Commission (SEC) or attach a copy of 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.

C-2. Financial statements

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

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

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.

C-4. Credit rating.

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

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.

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? If yes, attach a document detailing the information.
Applicant
Parent company of the applicant
Affiliate company that guarantees the financial obligations of the applicant
Any owner or officer of the applicant

Yes	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? If yes, attach a document detailing the information.

Yes	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.

C-9. Financial arrangements.

This section is only applicable if power marketer or retail electric generation provider has been selected in A-1.

Provide copies of the applicant's financial arrangements to satisfy collateral requirements to conduct retail electric/natural gas business activities (e.g., parental guarantees, letters of credit, contractual arrangements, etc., as described below).

Renewal applicants may provide a current statement from an Ohio local distribution utility (LDU) that shows that the applicant meets the LDU's collateral requirements. The statement or letter must be on the utility's letterhead and dated within a 30-day period of the date the applicant files its renewal application.

First-time applicants or applicants whose certificate has expired must meet the requirements of C-9 in one of the following ways:

1. The applicant itself states that it is investment grade rated by Moody's Investors Service, Standard & Poor's Financial Services, or Fitch Ratings and provides evidence of rating from the rating agencies. If you provided a credit rating in C-4, reference the credit rating in the statement.

2. The applicant's parent company is investment grade rated (by Moody's, Standard & Poor's, or Fitch) and guarantees the financial obligations of the applicant to the LDU(s).Provide a copy of the most recent credit opinion from Moody's, Standard & Poor's or Fitch.
3. The applicant's parent company 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 parent company's financials and a copy of the parental guarantee must be included in the application if the applicant is relying on this option.
4. The applicant can provide evidence of posting a letter of credit with the LDU(s) listed as the beneficiary, in an amount sufficient to satisfy the collateral requirements of the LDU(s).

D. Technical Capability

Provide an attachment for each of the sections below.

D-1. Operations.

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

Power Marketers/Generators: Describe the operational nature of the applicant's business, specifying whether operations will include the generation of power for retail sales, the scheduling of retail power for transmission and delivery, the provision of retail ancillary services, as well as other services used to arrange for the purchase and delivery of electricity to retail customers.

D-2. Operations expertise and key technical personnel.

Provide evidence of the applicant's experience and technical expertise in performing the operations described in this application. Include the names, titles, e-mail addresses, telephone numbers and background of key personnel involved in the operational aspects of the applicant's business. If vendors or third parties are or will be utilized for any activities listed in this application, provide the name, contact information for each, and list which activities they will perform. Also, indicate which activities will be performed directly by the company. Please note that this information is required to be updated within 30 days of any changes.

D-3. FERC power marketer authorization.

This section is only applicable if power marketer or retail electric generation provider has been selected in A-1.

Provide the FERC docket granting the applicant power marketer authority.

As authorized representative for the above company/organization, I certify that all the information contained in this application is true, accurate and complete. I also understand that failure to report completely and accurately may result in penalties or other legal actions.

James Dunn

Signature

4/15/2022

Date

Senior Counsel

Title

Competitive Retail Electric Service Affidavit

County of Hancock **:**

State of Ohio **:**

James D. Dunn, Affiant, being duly sworn/affirmed, hereby states that:

1. The information provided within the certification or certification renewal application and supporting information is complete, true, and accurate to the best knowledge of affiant, and that it will amend its application while it is pending if any substantial changes occur regarding the information provided.

2. The applicant will timely file an annual report of its intrastate gross receipts, gross earnings, and sales of kilowatt-hours of electricity pursuant to Sections 4905.10(A), 4911.18(A), and 4928.06(F), Ohio Revised Code.

3. The applicant will timely pay any assessment made pursuant to Sections 4905.10, 4911.18, and 4928.06(F), Ohio Revised Code.

4. The applicant will comply with all applicable rules and orders adopted by the Public Utilities Commission of Ohio pursuant to Title 49, Ohio Revised Code.

5. The applicant will cooperate fully with the Public Utilities Commission of Ohio, and its Staff on any utility matter including the investigation of any consumer complaint regarding any service offered or provided by the applicant.

6. The applicant will fully comply with Section 4928.09, Ohio Revised Code regarding consent to the jurisdiction of Ohio Courts and the service of process.

7. The applicant will comply with all state and/or federal rules and regulations concerning consumer protection, the environment, and advertising/promotions.

8. The applicant will use its best efforts to verify that any entity with whom it has a contractual relationship to purchase power is in compliance with all applicable licensing requirements of the Federal Energy Regulatory Commission and the Public Utilities Commission of Ohio.

9. The applicant will cooperate fully with the Public Utilities Commission of Ohio, the electric distribution companies, the regional transmission entities, and other electric suppliers in the event of an emergency condition that may jeopardize the safety and reliability of the electric service in accordance with the emergency plans and other procedures as may be determined appropriate by the Commission.

10. If applicable to the service(s) the applicant will provide, it will adhere to the reliability standards of (1) the North American Electric Reliability Council (NERC), (2) the appropriate regional reliability council(s), and (3) the Public Utilities Commission of Ohio.

11. The Applicant will inform the Public Utilities Commission of Ohio of any material change to the information supplied in the application within 30 days of such material change, including any change in contact person for regulatory purposes or contact person for Staff use in investigating consumer complaints.

12. The facts set forth above are true and accurate to the best of his/her knowledge, information, and belief and that he/she expects said applicant to be able to prove the same at any hearing hereof.

13. Affiant further sayeth naught.

NOTARIAL SEAL STATE OF OHIO

BRANDY N. REA
NOTARY PUBLIC
STATE OF OHIO
Comm. Expires
8/23/2023

Senior Counsel
Signature of Affiant & Title

Sworn and subscribed before me this 15th day of April, 2022
Month Year

Brandy N. Rea
Signature of official administering oath

Brandy N Rea
Print Name and Title

My commission expires on 8/23/2023

EXHIBIT A-12
PRINCIPAL OFFICERS, DIRECTORS & PARTNERS

OE Retail Services LLC is a member-managed limited liability company and managed by One Energy Enterprises Inc., the sole member. OE Retail Services LLC has no direct officers or directors. One Energy Enterprises Inc. is a corporation. It is managed by Jereme Kent. Jereme Kent's title is Chief Executive Officer and General Manager of One Energy Enterprises Inc. and his address is 12385 Township Road 215, Findlay, OH 45840.

EXHIBIT A-13
COMPANY HISTORY

OE Retail Services LLC was formed as a business entity on January 22, 2019, for the purpose of becoming a CRES in Ohio. It received its CRES certificate from the PUCO on May 20, 2020 and started to provide brokerage services as a CRES in December of 2021. It also received its CRNGS certificate from the PUCO on October 26, 2021. Its principal business interest is providing brokerage and aggregation services to its customers as a CRES and CRNGS going forward.

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EXHIBIT A-14
SECRETARY OF STATE

DATE	DOCUMENT ID	DESCRIPTION	FILING	EXPED	CERT	COPY
01/23/2019	201902201424	DOMESTIC FOR PROFIT LLC - ARTICLES OF ORG (LCP)	99.00	0.00	0.00	0.00

Receipt

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

ONE ENERGY
12385 TOWNSHIP RD 215
FINDLAY, OH 45840

STATE OF OHIO

CERTIFICATE

Ohio Secretary of State, Frank LaRose

4283133

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

OE RETAIL SERVICES LLC

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

Document(s)	Document No(s):
DOMESTIC FOR PROFIT LLC - ARTICLES OF ORG **Effective Date: 01/22/2019**	**201902201424**

THE SEAL OF THE SECRETARY OF STATE OF OHIO

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 23rd day of January, A.D. 2019.

Ohio Secretary of State

EXHIBIT B-1
JURISDICTIONS OF OPERATION

The applicant, as of the date of filing the application, is a certified Competitive Retail Electric Service Provider (CRES) as of May 20, 2020 and is a certified Competitive Retail Natural Gas Service Provider (CRNGS) as of October 23, 2021 in the state of Ohio. As such, the applicant is certified to provide retail electric and gas aggregation and power broker services in the state of Ohio.

EXHIBIT B-2
EXPERIENCE AND PLANS

The applicant, OE Retail Services LLC, was formed as a business entity on January 22, 2019, for the purpose of becoming a CRES in Ohio. It received its CRES certificate from the PUCO to provide electric brokering and aggregation services on May 20, 2020 and it received its CRNGS certificate to do the same on October 23, 2021.

One Energy Enterprises Inc. is the sole member of OE Retail Services LLC. Jereme Kent is the CEO and General Manager of One Energy Enterprises Inc. and has considerable experience in the electric industry. One Energy Enterprises Inc., as of the date of the filing of this application, installs, owns, and operates behind-the-meter wind turbines that are self-certified as qualifying facilities (QFs) under PURPA. These facilities, which total 40.5 MWs of installed facilities, power manufacturing and industrial facilities in the State of Ohio. One Energy has been offering these services to manufacturing and industrial users in the State of Ohio since 2011. As such, Mr. Kent has considerable experience in the electric industry. Additionally, One Energy Enterprises Inc. has recently added an analytics team that has over 25 years of combined experience in the retail energy industry, including natural gas brokerage service experience.

James D. Dunn, Senior Counsel for One Energy Enterprises Inc., is responsible for handling customer inquiries and complaints for OE Retail Services LLC in accordance with the Commission's rules promulgated under R.C. 4928.10. Prior to joining One Energy Enterprises Inc., Mr. Dunn was an Associate Assistant Attorney General at the Ohio Attorney General's Office, General Counsel for an energy solutions company, and spent almost five (5) years at the Public Utilities Commission of Ohio on staff and the commission level.

EXHIBIT B-3
DISCLOSURE OF LIABILITIES AND INVESTIGATIONS

There are no existing, pending or past rulings, judgments, contingent liabilities, revocations of authority, regulatory investigations, or any other matters that could adversely impact the applicant's financial or operational status or its ability to provide the services it is seeking to provide.

EXHIBIT C-1
FINANCIAL REPORTING

Neither the applicant nor its parent company are required to file periodic reports with the SEC because neither company has any securities registered under section 12 or 15 of the Securities Exchange Act of 1934, as amended. Therefore, Exhibit C-1 does not apply.

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EXHIBIT C-2
FINANCIAL STATEMENTS

CONFIDENTIAL

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EXHIBIT C-3
FORECASTED FINANCIAL STATEMENTS

CONFIDENTIAL

EXHIBIT C-4
CREDIT RATING

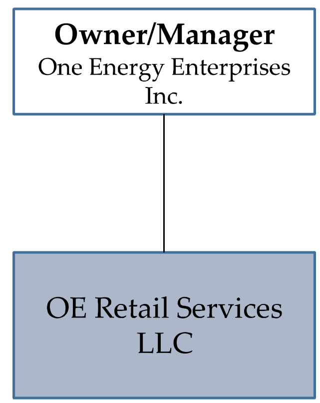
Neither the applicant nor its parent has a credit rating. Therefore, Exhibit C-4 does not apply.

EXHIBIT C-5
CREDIT REPORT

CONFIDENTIAL

OE Retail Services LLC

Ownership Structure



*No affiliates or subsidiaries supply retail or wholesale electricity to customers in North America. OE Retail Services LLC does have affiliates that are qualifying facilities (QFs) under PURPA that supply single customers with electricity behind-the-meter.

EXHIBIT C-9
FINANCIAL ARRANGEMENTS

Applicant is not taking title to the electricity and is seeking to be certified as an aggregator and broker. Therefore, Exhibit C-9 does not apply.

EXHIBIT D-1
OPERATIONS

OE Retail Services LLC's parent company and its affiliates (One Energy) have offered extensive electric services in Ohio for nearly a decade. One Energy added an analytics team in early 2021 that has over 25 years of combined experience in the retail energy industry, including electric generation brokerage experience. It utilizes this knowledge to provide Commission-regulated electric generation brokerage and aggregation services for the benefit of commercial, mercantile, and industrial customers throughout the State of Ohio.

EXHIBIT D-2
OPERATIONS EXPERTISE AND KEY TECHNICAL PERSONNEL

RICH BOHON
VP, Head of Analytics

Rich leads a team of professional analysts and problem solvers who are responsible for the strategies and solutions that help our customers become better consumers of energy.

The One Energy Analytics team was originally assembled early in Ohio's deregulation history and has used customers' data coupled with consistent educational practices, proven modeling strategies, and frequent customer interaction to drive savings to our customers' utility expenses. The vast knowledge and experience of the team members provide the perfect balance between data analytics and business methodology. Prior to joining One Energy, Rich held positions with Lykins Energy Advisors, and Ford Motor Company, and owned his own service company. Rich holds a Master of Science in Mechanical Engineering from The Ohio State University College of Engineering where he specialized in fluid dynamics.

Rich has brokered electric generation and helped customers develop electric infrastructure for large use facilities since 2013.

SCOTT ERICKSON
Director of Analytics

As the team's Director of Analytics, Scott uses business discovery and interpretation of data analytics to communicate meaningful patterns in data to customers. He combines scientific technology with regulatory best practices so that optimal energy solutions are achieved. Prior to joining One Energy, Scott was the Strategic Solutions Manager for Lykins Energy Advisors, where he played a key role in establishing and managing the professional energy consulting and services firm. Scott holds a Bachelor of Arts in Economics & Business from the University of Cincinnati.

Scott has brokered electric generation in the state of Ohio since 2013.

JEFF WEDGEWORTH
Technical Manager

Jeff leads the One Energy Analytics team's data and modeling efforts, as well as a broad array of energy consulting projects.

Key to the project-oriented work Jeff provides for customers is a focus on customer service and transparency. He works as an analyst, problem solver, and educator who identifies primary energy issues for customers and creates elegant solutions in a timely fashion. He has consulted for organizations in the commercial, industrial, and public sectors, providing strategies that manage customer risk and support their bottom line. Jeff's expertise in renewable energy and storage technologies and his analytical approach to their feasibility and development are greatly valuable.

Jeff first worked as an analyst with AEP Energy, modeling customer churn and renewable energy project feasibility. Before One Energy, Jeff led the analytics team at Lykins Energy Advisors. Jeff holds a Master of Environmental Science from Miami University Oxford and earned undergraduate degrees in Physics and Philosophy at Oberlin College.

Jeff has brokered electric generation in the state of Ohio since 2014.

EXHIBIT B

Ohio | Public Utilities Commission

Competitive Retail Natural Gas Service (CRNGS) Provider Application

Instructions for Competitive Retail Natural Gas Service (CRNGS) Providers

I. **Where to file:** Applications can be completed and submitted via the PUCO Community. Paper applications, an original plus two copies, can be mailed to: Public Utilities Commission of Ohio, Docketing Division, 180 East Broad Street, Columbus Ohio 43215-3793.

II. **Case Number:** If Applicant is applying for any combination of broker and/or aggregator, the application must be filed with an "AGG" purpose code. If the application includes marketer, then the purpose code must be "CRS".

III. **Renewal applications:** A certificate is valid for two years from the date of issuance. An application for renewal should be filed in the Applicant's existing case number 30-90 days prior to the expiration date printed on the certificate.

IV. **Confidentiality**: An applicant may file financial statement, forecasted financial statements, financial arrangements, credit ratings, and credit reports under seal. Confidentiality for other items must be requested in a motion filed in the docket. Motions for protective orders must be filed in accordance with Ohio Administrative Code 4901-1-24, 4901:1-27, and 4901:1-24.

V. **Commission approval process**: The Commission approval process begins when the Commission's Docketing Division receives and time/date stamps the application. An incomplete application may be suspended or rejected. An application that has been suspended an incomplete may cause delay in certification. The Commission may approve, suspend, or deny an application within 30 days. If no action is taken, the application is deemed automatically approved on the 31st day after the official filing date. Upon approval, the Commission will issue a numbered certificate that specifies the service(s) for which the applicant is certified and the dates for which the certificate is valid.

VI. **Material change**: Providers are required to notify the Commission of any changes to the information provided in its most recent application within thirty days of the change.

VII. **Governing law**: The certification and renewal of competitive providers is governed by Chapters 4901:1-21, 4901:1-24, 4901:1-27, 4901:1-28, and 4901:1-29 of the Ohio Administrative Code, and Sections 4928.08 and 4929.20 of the Ohio Revised Code.

VIII. **Questions**: Questions regarding the application should be directed to CRES@puco.ohio.gov or CRNGS@puco.ohio.gov.

This page is for informational purposes and should not be filed with the application.

Ohio | Public Utilities Commission

Competitive Retail Natural Gas Service (CRNGS) Provider Application

Case Number: 21 - 0963 -GA- AGG

Please complete all information. Identify all attachments with a label and title (example: Exhibit C-2 Financial Statements). For paper filing, you can mail the original and two complete copies to the Public Utilities Commission of Ohio, Docketing Division, 180 East Broad Street, Columbus, Ohio 43215-3793.

A. Application Information

A-1. Provider Type.

Select the competitive retail natural gas service (CRNGS) provider type(s) for which the applicant is seeking certification. Please note you can select more than one.

Retail Natural Gas Aggregator	Retail Natural Gas Broker	Retail Natural Gas Marketer
☑	☑	☐

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

Provide the name and contact information of the business entity.

Legal Name: OE Retail Services LLC

Street Address: 12385 Township Road 215

City: Findlay State: Ohio Zip: 45840

Telephone: 877-298-5853 Website: ____________

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: One Energy Analytics

Street Address: 12385 Township Road 215

City: Findlay State: Ohio Zip: 45840

Telephone: 877-298-5833 Email: rbohon@oneenergyllc.com

A-4. Names under which the applicant does business in North America.

Provide all business names the applicant uses in North America. You do not need to include the names provided in A-2 and A-3.

Name(s): ____________ ____________

____________ ____________

A-5. Contact person for regulatory matters.

Name: James D. Dunn Title: Senior Counsel
Street Address: 12385 Township Road 215
City: Findlay State: Ohio Zip: 45840
Telephone: 419-379-8552 Email: jdunn@oneenergyllc.com

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

Name: James D. Dunn Title: Senior Counsel
Street Address: 12385 Township Road 215
City: Findlay State: Ohio Zip: 45840
Telephone: 419-379-8552 Email: jdunn@oneenergyllc.com

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

Street Address: 12385 Township Road 215
City: Findlay State: Ohio Zip: 45840
Toll-free Telephone: 877-298-5853 Email: oeretail@oneenergyllc.com

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

FEIN: 833272737

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

- ☐ Sole Proprietorship
- ☐ Limited Liability Partnership (LLP)
- ☐ Corporation
- ☐ Partnership
- ☑ Limited Liability Company (LLC)
- Other: ____________

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	Residential	Small Commercial	Large Commercial
☑	☐	☑	☑

A-11. Start Date.

Indicate the approximate start date the applicant began/will begin offering services.

Date: November 1, 2021

A-12. Principal officers, directors and partners.

Please provide an attachment for all contacts that should be listed as an officer, director or partner.

A-13. Company history.

Provide an attachment with a concise description of the applicant's company history and principal business interests.

A-14. Secretary of State.

Provide evidence that the applicant is currently registered with the Ohio Secretary of State.

A-15. Proof of Ohio office and employee.

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.

Name: Rich Bohon Title: VP, Head of Analytics

Street Address: 12385 Township Road, 215

City: Findlay State: Ohio Zip: 45840

Telephone: 877-298-5853 Email: rbohon@oneenergyllc.com

B. Managerial Capability

Provide a response or attachment for each of the sections below.

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.

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.

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? If yes, attach a document detailing the information.

Yes ☐ 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? If yes, attach a document detailing the information.

Yes ☐ No ☑

C. Financial Capability

Provide a response or attachment for each of the sections below.

C-1. Financial reporting.

Provide a current link to the most recent Form 10-K filed with the Securities and Exchange Commission (SEC) or attach a copy of 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.

C-2. Financial statements

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

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C-4. Credit rating.

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

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.

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? If yes, attach a document detailing the information.
Applicant
Parent company of the applicant
Affiliate company that guarantees the financial obligations of the applicant
Any owner or officer of the applicant

Yes	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? If yes, attach a document detailing the information.

Yes	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.

C-9. Financial arrangements.

This section is only applicable if power marketer or retail electric generation provider has been selected in A-1.

Provide copies of the applicant's financial arrangements to satisfy collateral requirements to conduct retail electric/natural gas business activities (e.g., parental guarantees, letters of credit, contractual arrangements, etc., as described below).

Renewal applicants may provide a current statement from an Ohio local distribution utility (LDU) that shows that the applicant meets the LDU's collateral requirements. The statement or letter must be on the utility's letterhead and dated within a 30-day period of the date the applicant files its renewal application.

First-time applicants or applicants whose certificate has expired must meet the requirements of C-9 in one of the following ways:

1. The applicant itself states that it is investment grade rated by Moody's Investors Service, Standard & Poor's Financial Services, or Fitch Ratings and provides evidence of rating from the rating agencies. If you provided a credit rating in C-4, reference the credit rating in the statement.

2. The applicant's parent company is investment grade rated (by Moody's, Standard & Poor's, or Fitch) and guarantees the financial obligations of the applicant to the LDU(s).Provide a copy of the most recent credit opinion from Moody's, Standard & Poor's or Fitch.
3. The applicant's parent company 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 parent company's financials and a copy of the parental guarantee must be included in the application if the applicant is relying on this option.
4. The applicant can provide evidence of posting a letter of credit with the LDU(s) listed as the beneficiary, in an amount sufficient to satisfy the collateral requirements of the LDU(s).

D. Technical Capability

Provide an attachment for each of the sections below.

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.

Gas Marketers: Describe the operational nature of the applicant's business, specifying whether operations will include the contracting of natural gas purchases for retail sales, the nomination and scheduling of retail natural gas for delivery, and/or the provision of retail ancillary services, as well as other services used to supply natural gas to the natural gas company city gate for retail customers.

D-2. Operations expertise and key technical personnel.

Provide evidence of the applicant's experience and technical expertise in performing the operations described in this application. Include the names, titles, e-mail addresses, telephone numbers and background of key personnel involved in the operational aspects of the applicant's business.

As authorized representative for the above company/organization, I certify that all the information contained in this application is true, accurate and complete. I also understand that failure to report completely and accurately may result in penalties or other legal actions.

Signature

9/23/21
Date

SVP
Title

Competitive Retail Natural Gas Service Affidavit

County of Hancock :

State of Ohio :

James Dunn, 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.

James Dunn, Senior Counsel
Signature of Affiant & Title

KENZIE TUCKER
Notary Public
State of Ohio
My Comm. Expires
August 15, 2026

Sworn and subscribed before me this 24 day of September, 2021
Month Year

Kenzie Tucker
Signature of official administering oath

Kenzie Tucker - associate
Print Name and Title

My commission expires on August 15, 2026

EXHIBIT A-12
PRINCIPAL OFFICERS, DIRECTORS & PARTNERS

OE Retail Services LLC is a member-managed limited liability company and managed by One Energy Enterprises LLC, the sole member. OE Retail Services LLC has no direct officers or directors. One Energy Enterprises LLC is a manager-managed limited liability company. It is managed by one member, who at present is Jereme Kent. Jereme Kent's title is Chief Executive Officer and General Manager of One Energy Enterprises LLC and his address is 12385 Township Road 215, Findlay, OH 45840.

EXHIBIT A-13
COMPANY HISTORY

OE Retail Services LLC was formed as a business entity on January 22, 2019, for the purpose of becoming a CRES in Ohio. It received its CRES license from the PUCO on May 20, 2020, and has just recently started to provide brokerage services as a CRES in September of 2021. Its principal business interest is providing brokerage and aggregation services to its customers as a CRES and CRNGS going forward.

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EXHIBIT A-14
SECRETARY OF STATE

DATE	DOCUMENT ID	DESCRIPTION	FILING	EXPED	CERT	COPY
01/23/2019	201902201424	DOMESTIC FOR PROFIT LLC - ARTICLES OF ORG (LCP)	99.00	0.00	0.00	0.00

Receipt

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

ONE ENERGY
12385 TOWNSHIP RD 215
FINDLAY, OH 45840

STATE OF OHIO

CERTIFICATE

Ohio Secretary of State, Frank LaRose

4283133

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

OE RETAIL SERVICES LLC

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

Document(s)	Document No(s):
DOMESTIC FOR PROFIT LLC - ARTICLES OF ORG **Effective Date: 01/22/2019**	**201902201424**

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 23rd day of January, A.D. 2019.

Ohio Secretary of State

EXHIBIT B-1
JURISDICTIONS OF OPERATION

The applicant, as of the date of filing the application, is a certified Competitive Retail Electric Service Provider (CRES) as of May 20, 2020, in the state of Ohio. As such, the applicant is certified to provide retail electric aggregation and power broker services in the state of Ohio.

Ohio | **Public Utilities Commission**

Sam Randazzo, Chairman

PUBLIC UTILITIES COMMISSION OF OHIO

Certified as a Competitive Retail Electric Service Provider

Certificate Number:
20-1474E (1)

Issued Pursuant to Case Number(s):

20-0654-EL-AGG

A certificate as a Competitive Retail Electric Service Provider is hereby granted to **OE Retail Services LLC** whose office or principal place of business is located at **12385 Township Road 215, Findlay, OH 45840** to provide **aggregation and power broker** services within the State of Ohio **effective May 20, 2020.**

The certification of competitive retail electric suppliers is governed by Section 4901:1-24-(01-13) of the Ohio Administrative Code, Section 4901:1-21-(01–15) of the Ohio Administrative Code, and Section 4928.08 of the Ohio Revised Code.

This Certificate is revocable if all of the conditions set forth in the aforementioned case(s) are not met.

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 27, 2020**

By Order of

PUBLIC UTILITIES COMMISSION OF OHIO

Debbie Ryan

Tanowa M. Troupe, Secretary
Debbie Ryan, Acting Secretary
Donielle M. Hunter, Acting Secretary
Susan Patterson, Acting Secretary

Certificate Expires: May 20, 2022

CRES AUTOMATIC CASE ACTION FORM

Date: **5-26-20** Case Number: **20-0654-EL-AGG**

Company Name and Company Name d/b/a: **OE Retail Services LLC**
Company Address: **12385 Township Road 215**
Company City/State/Zip: **Findlay OH 45840**

Regulatory Contact: **Katie Johnson Treadway**

Phone: **419-905-5821**
Email: **ktreadway@oneenergyllc.com**
Address: **12385 Township Road 215**
City/State/Zip: **Findlay OH 45840**

☐ Renewal

Action Needed:

☒ Issue Certificate Number to: **OE Retail Services LLC**
Effective Date of Certificate: **5-20-20** Certificate Expires: **5-20-22**

☐ Renew Certificate Number from: to:
Effective Date of Certificate: Certificate Expires:

☒ Certified To Provide the Following Services:

- ☐ Retail Generation
- ☒ Aggregation
- ☐ Power Marketer
- ☒ Power Broker
- ☐ Governmental Aggregation

☐ Revise Certificate Number: to (check all applicable):

- ☐ Reflect name change from: to
- ☐ Reflect address change from: to
- ☐ Correct Administrative Error:
- ☐ Reflect Change of Ownership to:

☐ Cancel Certificate Number:
☐ Protect Un-redacted copies until:
☐ Close Case File, Case Withdrawn at Applicant's Request
☐ Close Case File

CASE NUMBER: 20-0654-EL-AGG
CASE DESCRIPTION: OE Retail Services LLC
DATE OF SERVICE: 5/27/2020
DOCUMENT SIGNED ON: 5/27/20

Sign Here:________________________

APPLICANT

PARTY OF RECORD	ATTORNEY
OE RETAIL SERVICES LLC KATIE JOHNSON TREADWAY 12385 TOWNSHIP ROAD 215 FINDLAY,OH 45840 Phone:877-298-5853	NONE

ATTORNEY

PARTY OF RECORD	ATTORNEY
none	*Fischer, Mary E Ms. Public Utilities Commission of Ohio 180 E. Broad St. Columbus,OH 43215 Phone:(614)466-0469 Email:mary.fischer@puco.ohio.gov
none	*Treadway, Katie Johnson Ms. One Energy Enterprises LLC 12385 Township Road 215 Findlay,OH 45840 Phone:419-905-5821 Email:ktreadway@oneenergyllc.com
none	*Staff, Docketing Docketing 180 East Broad Street 11th Floor Columbus,OH 43215 Phone:614-466-4095 Fax:614-466-0313 Email:docketing@puco.ohio.gov

none	*Ramsey, Nedra PUCO 180 E Broad St 7th Floor Columbus,OH 43081 Phone:614-466-8526 Email:Nedra.Ramsey@puco.ohio.gov

EXHIBIT B-2
EXPERIENCE AND PLANS

The applicant, OE Retail Services LLC, was formed as a business entity on January 22, 2019, for the purpose of becoming a CRES in Ohio. It received its CRES license from the PUCO to provide electric brokering and aggregation services on May 20, 2020. It has just started conducting business as a CRES in September of 2021.

One Energy Enterprises LLC is the sole manager of OE Retail Services LLC. Jereme Kent is the CEO and General Manager of One Energy Enterprises LLC and has considerable experience in the electric industry. One Energy Enterprises LLC, as of the date of the filing of this application, installs, owns, and operates behind-the-meter wind turbines that are self-certified as qualifying facilities (QFs) under PURPA. These facilities, which total 40.5 MWs of installed facilities, power manufacturing and industrial facilities in the State of Ohio. One Energy has been offering these services to manufacturing and industrial users in the State of Ohio since 2011. As such, Mr. Kent has considerable experience in the electric industry. Additionally, One Energy Enterprises LLC has recently added an analytics team that has over 25 years of combined experience in the retail energy industry, including natural gas brokerage service experience.

James D. Dunn, Senior Counsel for One Energy Enterprises LLC, is responsible for handling customer inquiries and complaints for OE Retail Services LLC in accordance with the Commission's rules promulgated under R.C. 4928.10. Prior to joining One Energy Enterprises LLC, Mr. Dunn was an Associate Assistant Attorney General at the Ohio Attorney General's Office, General Counsel for an energy solutions company, and spent almost five (5) years at the Public Utilities Commission of Ohio on staff and the commission level.

EXHIBIT B-3
DISCLOSURE OF LIABILITIES AND INVESTIGATIONS

There are no existing, pending or past rulings, judgments, contingent liabilities, revocations of authority, regulatory investigations, or any other matters that could adversely impact the applicant's financial or operational status or its ability to provide the services it is seeking to provide.

EXHIBIT C-1
FINANCIAL REPORTING

Neither the applicant nor its parent company are required to file periodic reports with the SEC because neither company has any securities registered under section 12 or 15 of the Securities Exchange Act of 1934, as amended. Therefore, Exhibit C-1 does not apply.

EXHIBIT C-2
FINANCIAL STATEMENTS

CONFIDENTIAL

EXHIBIT C-3
FORECASTED FINANCIAL STATEMENTS

OE Retail Services LLC - Natural Gas	1	2	3
ESTIMATED INCOME STATEMENT	2020E	2021E	2022E
Brokerage Fees	**5,000**	**50,000**	**100,000**
Less: Operating Expenses			
Payroll	10,000	50,000	50,000
Operating Expenses	5,000	5,000	5,000
Total Operating Expenses	**15,000**	**55,000**	**55,000**
Operating Profit	**(10,000)**	**(5,000)**	**45,000**
Net Income	**(10,000)**	**(5,000)**	**45,000**

EXHIBIT C-4
CREDIT RATING

Neither the applicant nor its parent has a credit rating. Therefore, Exhibit C-4 does not apply.

EXHIBIT C-5
CREDIT REPORT

CONFIDENTIAL

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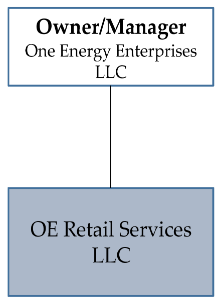
EXHIBIT C-8
CORPORATE STRUCTURE

OE Retail Services LLC

Ownership Structure



*No affiliates or subsidiaries supply retail or wholesale electricity to customers in North America. OE Retail Services LLC does have affiliates that are qualifying facilities (QFs) under PURPA that supply single customers with electricity behind-the-meter.

EXHIBIT C-9
FINANCIAL ARRANGEMENTS

Applicant is not taking title to the natural gas and is seeking to be certified as an aggregator and broker. Therefore, Exhibit C-9 does not apply.

EXHIBIT D-1
OPERATIONS

OE Retail Services LLC's parent company and its affiliates (One Energy) have offered extensive electric services in Ohio for nearly a decade. Recently, One Energy added an analytics team that has over 25 years of combined experience in the retail energy industry, including natural gas brokerage experience. It intends to use its knowledge in providing these services to expand its current offerings to include Commission-regulated natural gas brokerage and aggregation services for the benefit of commercial, mercantile, and industrial customers throughout the State of Ohio.

EXHIBIT D-2
OPERATIONS EXPERTISE AND KEY TECHNICAL PERSONNEL

RICH BOHON
VP, Head of Analytics

Rich leads a team of professional analysts and problem solvers who are responsible for the strategies and solutions that help our customers become better consumers of energy.

The One Energy Analytics team was originally assembled early in Ohio's deregulation history and has used customers' data coupled with consistent educational practices, proven modeling strategies, and frequent customer interaction to drive savings to our customers' utility expenses. The vast knowledge and experience of the team members provide the perfect balance between data analytics and business methodology. Prior to joining One Energy, Rich held positions with Lykins Energy Advisors, and Ford Motor Company, and owned his own service company. Rich holds a Master of Science in Mechanical Engineering from The Ohio State University College of Engineering where he specialized in fluid dynamics.

Rich has brokered Natural Gas and helped customers develop Natural Gas infrastructure for large use facilities since 2013.

SCOTT ERICKSON
Director of Analytics

As the team's Director of Analytics, Scott uses business discovery and interpretation of data analytics to communicate meaningful patterns in data to customers. He combines scientific technology with regulatory best practices so that optimal energy solutions are achieved. Prior to joining One Energy, Scott was the Strategic Solutions Manager for Lykins Energy Advisors, where he played a key role in establishing and managing the professional energy consulting and services firm. Scott holds a Bachelor of Arts in Economics & Business from the University of Cincinnati.

Scott has brokered Natural Gas in the state of Ohio since 2013.

JEFF WEDGEWORTH
Technical Manager

Jeff leads the One Energy Analytics team's data and modeling efforts, as well as a broad array of energy consulting projects.

Key to the project-oriented work Jeff provides for customers is a focus on customer service and transparency. He works as an analyst, problem solver, and educator who identifies primary energy issues for customers and creates elegant solutions in a timely fashion. He has consulted for organizations in the commercial, industrial, and public sectors, providing strategies that manage customer risk and support their bottom line. Jeff's expertise in renewable energy and storage technologies and his analytical approach to their feasibility and development are greatly valuable.

Jeff first worked as an analyst with AEP Energy, modeling customer churn and renewable energy project feasibility. Before One Energy, Jeff led the analytics team at Lykins Energy Advisors. Jeff holds a Master of Environmental Science from Miami University Oxford and earned undergraduate degrees in Physics and Philosophy at Oberlin College.

Jeff has brokered Natural Gas in the state of Ohio since 2014.