



DIS Case Number: 17-1107-EL-AGG

Section A: Application Information

A-1. Provider type:

☒ Power Broker ☐ Aggregator ☐ Retail Generation Provider ☐ Power Marketer

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

Legal Name: Intelligen Resources LP **Country:** United States
Phone: 2147277720 **Extension (if applicable):** **Street:** 1660 S. University Drive #1151
Website (if any): intelligenresources.com **City:** Fort Worth **Province/State:** TX
Postal Code: 76107

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
Intelligen Resources LP	Official Name	1660 S. University Drive #1151 Fort Worth, TX 76107	Yes	File

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

Provide all business names the applicant uses in North America, including the names provided in A-2 and A-3.

Name	Type	Address	Active?	Proof
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A-5. Contact person for regulatory matters



John Tate
1660 S. University Drive #1151
Fort Worth, TX 76107
US
jtate@intelligenresources.com
2147277720

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

John Tate
1660 S. University Drive #1151
Fort Worth, TX 76107
US
jtate@intelligenresources.com
2147277720

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

Phone: 2147277720	Extension (if applicable):	Country: United States
Fax:	Extension (if applicable):	Street: 1660 S. University Drive #1151
Email: jtate@intelligenresources.com		City: Fort Worth Province/State: TX
		Postal Code: 76107

A-8. Applicant's federal employer identification number

27-1287605

A-9. Applicant's form of ownership

Form of ownership: Partnership

A-10. Identify current or proposed service areas

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

Service area selection

Duke Energy Ohio



FirstEnergy - Cleveland Electric Illuminating
FirstEnergy - Ohio Edison
FirstEnergy - Toledo Edison
AES Ohio
American Electric Power (AEP)

Class of customer selection

Commercial
Industrial
Residential

A-11. Start date

Indicate the approximate start date the applicant began/will begin offering services: 05-01-2022

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
John Tate	jtate@intelligenresources.com	President	1660 S. University Drive #1151 Fort Worth, TX 76107 US

A-13. Company history

Intelligen Resources, LP (IRE) is a national energy management and procurement firm helping companies implement strategies to control and reduce energy costs. Our goal is to provide clients with premium energy management services to lower electricity and natural gas cost, reduce energy consumption, provide a long-term energy management strategy, and implement risk mitigation strategies for the future.

IRE offers our clients a full suite of energy management services including; market analysis by state, energy supplier bid analysis and comparison, contract evaluation, energy audits, and efficiency programs. Intelligen Resources (IRE) was founded in 2009 to provide new and innovative solutions for Generation and Retail Loads throughout the nation. IRE's leadership incorporates over 100 years of national, regional and state energy policy development, consulting, engineering and energy trading experience. Our team have a broad array of professional accomplishments in both the public and private sectors, ranging from the Director

of the State of Maine's Energy Office, the Director of Policy for the New England Governors' Association, to top leadership positions at TXU, Direct Energy, Hess, Atmos, Integrys Energy Services, and Intelligen Resources. IRE is headquartered in Texas with office locations in Baltimore and Washington DC.

The IRE team is equipped with the proper leadership, technology, and financial security to providing premium energy management services across North America; we are committed to providing effective and efficient solutions through continuous innovation and the provision of higher levels of service to our clients.

A-14. Secretary of State

Secretary of State Link: <https://businesssearch.ohiosos.gov?=businessDetails/1966452>

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: Texas 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: Intelligen Resources, LP is a national energy management and procurement firm helping companies implement strategies to control and reduce energy costs. Our goal is to provide clients with premium energy management services to lower electricity and natural gas cost, reduce energy consumption, provide a long-term energy management strategy, and implement risk mitigation strategies for the future. IRE offers our clients a full suite of energy management services including market analysis by state, energy supplier bid analysis and comparison, contract evaluation, energy audits, efficiency programs, among other services. Currently Intelligen represents over 300 commercial and industrial meters behind a multitude of electric utilities in Texas, and Pennsylvania.

Intelligen Resources manages the energy procurement process from start to finish for its clients. Creating the proper competitive environment and accurately comparing competing offers is critical to the energy procurement process. IRE's relentless focus on the details of proposals, pricing structures, and contracts ensures that clients get the maximum value out of their procurement strategy and do not face the surprise of an unexpected cost after contract execution.

B-3. Disclosure of liabilities and investigations

For the applicant, affiliate, predecessor of the applicant, or any principal officer of the applicant, describe all existing, pending or past rulings, judgments, findings, contingent liabilities, revocation of authority, regulatory investigations, judicial actions, or other formal or informal notices of violations, or any other matter related to competitive services in Ohio or equivalent services in another jurisdiction..

Liability and Investigations Disclosures: No existing or pending past rulings, judgments, contingent liabilities, revocation of authority, regulatory investigations, or any other matter that could adversely impact the applicant's financial or operational status, or ability to provide the services it is seeking to be certified to provide exist.

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

B-6. Environmental disclosures

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.

PJM disclosure option chosen

Section C: Applicant Financial Capability and Experience

C-1. Financial reporting

Provide a current link to the most recent Form 10-K filed with the Securities and Exchange Commission (SEC) or upload the form. If the applicant does not have a Form 10-K, submit the parent company's Form 10-K. If neither the applicant nor its parent is required to file Form 10-K, state that the applicant is not required to make such filings with the SEC and provide an explanation as to why it is not required.

Does not apply

C-2. Financial statements

Provide copies of the applicant's two most recent years of audited financial statements, including a balance sheet, income statement, and cash flow statement. If audited financial statements are not available, provide officer certified financial statements. If the applicant has not been in business long enough to satisfy this requirement, provide audited or officer 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

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

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

Operations Description: Our company operates as an energy broker in Ohio, specializing in procuring electricity for commercial clients. We engage with clients, negotiate supply contracts with energy suppliers, maintain regulatory compliance, and provide ongoing customer support.

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: John Tate is the President of IntelliGEN Resources LP. He has provided consulting services to the deregulated energy industry for over 21 years and has consulted to the electric and gas consumers in related public and private sector institutions. John's skill set includes expertise in energy procurement, demand side management and energy efficiency services, and delivers high value by providing timely access to market intelligence, customized solutions, and comprehensive understanding of electric and gas buying strategies for commercial and industrial clients throughout the country. He has a special expertise in the assessment of industrial and commercial sector energy load analysis, investment decision behavior, and assisting companies with the development, implementation, and enhancement of customized product and service offerings. John has been previously



certified as a Certified Energy Professional by The Association of Energy Engineers and is a graduate of Auburn University.

Application Attachments

Competitive Retail Electric Service Affidavit

County of Parker :

State of Texas :

Johnathan Tate, 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.

John [Signature]
Signature of Affiant & Title

Sworn and subscribed before me this 21 day of March, 2024
Month Year

Diana Kotlinski
Signature of official administering oath

Diana Kotlinski
Print Name and Title



My commission expires on 9-5-26

**This foregoing document was electronically filed with the Public Utilities
Commission of Ohio Docketing Information System on**

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Case No(s). 17-1107-EL-AGG

Summary: In the Matter of the Application of Intelligen Resources LP