



# ENERGY EFFICIENCY & RENEWABLE ENERGY FINANCIAL INCENTIVE PROGRAM

**REBATES ARE SUBJECT TO THE AVAILABILITY OF FUNDS**

**PROGRAM CYCLE: NOVEMBER 22, 2022 TO SEPTEMBER 30, 2023**



**Please check off and attach all of the following: (INCOMPLETE AND UNSIGNED APPLICATIONS WILL NOT BE ACCEPTED)**

- Completed rebate application (*all highlighted areas filled out*)
- Completed IRS W-9 form (*with mailing address noted*)
- USVI government issued identification
- ORIGINAL** sales receipt (*photocopies will not be accepted*)
- ENERGY STAR®** product verification information

**For small business & Non-Profit organizations:**

- USVI business license
- VI WAPA electric bill
- Non-Profit or Not-for-Profit documents

**Verified & Received by VIEO:** \_\_\_\_\_  
Employee's Initial/Date

## Section A: Applicant Information

**Name:** (Last, First, Middle Initial) \_\_\_\_\_

**Business or Entity Name:** \_\_\_\_\_  **Non-Profit/Not-for-Profit**

**Last 4 Digits of SSN or EIN:** \_\_\_\_\_ **E-mail Address:** \_\_\_\_\_

**Installation/Physical Address:** \_\_\_\_\_

**Current Mailing Address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Mobile/Cell:** \_\_\_\_\_ **Historic Building:**  Yes  No

## Section B: Approved Vendor and Product Information

<b>Place of Purchase:</b> _____	<b>Item Purchased (1):</b> _____
Address: _____	<b>Brand Name:</b> _____
City/State/Zip _____	<b>Model #:</b> _____
<b>Vendor's Signature:</b> _____	<b>Serial #:</b> _____
<b>Item Price:</b> _____	<b>Item Purchased (2):</b> _____
<b>Quoted Rebate:</b> _____	<b>Brand Name:</b> _____
<b>Purchase Date:</b> _____	<b>Model #:</b> _____
<b>Receipt/Invoice #:</b> _____	<b>Serial #:</b> _____

I certify that all information supplied herein is true and correct. I understand that the VIEO reserves the right to inspect items to ensure installation at the above address. Failure to install rebate items at the address listed above will result in repayment or return of rebate funds. **I understand that non-compliance with the rebate program rules and regulations is considered fraudulent and prosecutable, and that payment is contingent on the availability of funds.**

**APPLICANT SIGNATURE** \_\_\_\_\_ **DATE** \_\_\_\_\_

## QUESTIONNAIRE

- Are you buying this item as a  homeowner  tenant  landlord  small business owner?
- Is the installation  single-family residence  2-4 family residence  condominium  commercial space?
- Major reason for making this purchase  replacement  necessity  remodeling  new home/business  energy savings
- If a replacement, is the new unit a  smaller size  same size  larger size  an additional unit
- Would you have purchased this item if the rebate were not offered?  Yes  No
- What will you do with the old item?  discard  give away  sell  trade-in  continue to use

## PLEASE HELP US DETERMINE THE DEVELOPMENT OF THIS PROGRAM BY ANSWERING THE FOLLOWING QUESTIONS:

- Have you received a rebate from the VIEO before? If yes, year(s) \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
Item(s): \_\_\_\_\_
- Household size:  1-3  4-6  7 or more
- Household income:  \$19,000-\$39,999  \$40,000+

## ENERGY EFFICIENCY & RENEWABLE ENERGY FINANCIAL INCENTIVE PROGRAM APPLICATION INSTRUCTIONS

WHO CAN APPLY?	HOW TO APPLY?
<ul style="list-style-type: none"> <li>◆ This rebate offer applies only to <b>legal residents of the U.S. Virgin Islands</b>. To claim residency, applicant MUST be domiciled (<b>established as your PRIMARY residence</b>) in the Territory. The VIEO reserves the right to request proof of residency, i.e., VI income tax return or USVI government issued identification (<i>driver's license, voter's ID card, or senior citizen ID card</i>).</li> <li>◆ Small businesses (VI WAPA electric bill with an average of <b>2,500 kWh/month or less</b>)</li> <li>◆ Non-profits or Not-for-Profit organizations</li> <li>◆ <b>REBATES ARE NOT AVAILABLE FOR GOVERNMENT PURCHASES.</b></li> <li>◆ Applicants may submit a separate application as an individual resident, as well as a small business owner. Applicants can submit one application as an individual and one as a small business owner, <b>each not to exceed a rebate amount of \$5,000</b>. The IRS W-9 information must reflect the respective mailing address.</li> </ul>	<ul style="list-style-type: none"> <li>◆ <b>Rebate applications MUST be submitted to the VIEO within 30 CALENDAR DAYS of purchase – NO EXCEPTION!</b></li> <li>◆ Applications can be obtained from the VIEO offices, online at <a href="http://energy.vi.gov">energy.vi.gov</a> and Facebook <a href="https://www.facebook.com/VirginIslandsEnergyOffice">@VirginIslandsEnergyOffice</a>, or participating vendors.</li> <li>◆ <b>Name on the rebate application, IRS W-9 form, and sale receipt MUST be the same!</b></li> <li>◆ <b>COMPLETE ALL INFORMATION</b> including the questionnaire, which is used for data collection in determining future grant opportunities.</li> <li>◆ <b>Make sure that the vendor completes and signs Section B.</b></li> <li>◆ <b>Submit in person to:</b> Virgin Islands Energy Office <ul style="list-style-type: none"> <li>○ ST. CROIX – #2 Estate Carlton, Suite 3, Frederiksted</li> <li>○ ST. THOMAS – 8000 Nisky Center, 2<sup>nd</sup> Floor, Suite 208</li> </ul> </li> <li>◆ <b>Send by email to:</b> <ul style="list-style-type: none"> <li>○ ST. CROIX – <a href="mailto:michael.jaffurs@eo.vi.gov">michael.jaffurs@eo.vi.gov</a></li> <li>○ ST. THOMAS – <a href="mailto:molissa.brin@eo.vi.gov">molissa.brin@eo.vi.gov</a></li> </ul> </li> <li>◆ <b>Apply online at <a href="https://energy.vi.gov">https://energy.vi.gov</a></b></li> </ul>
WHAT DO YOU NEED?	PROGRAM RULES AND REGULATIONS:
<ul style="list-style-type: none"> <li>◆ <b>Rebate application</b></li> <li>◆ <b>IRS W-9 form (with applicant's mailing address)</b></li> <li>◆ <b>USVI government issued identification (driver's license, voter's ID card, or senior citizen ID card)</b></li> <li>◆ <b>Original sales receipt with the product information and pricing itemized. The receipt or invoice must show that ALL items were "paid in full" or show a zero balance. <i>Rebates are processed after payment of the full invoice amount.</i></b></li> <li>◆ <b>ENERGY STAR® product verification. Visit <a href="http://www.energystar.gov/productfinder/">www.energystar.gov/productfinder/</a>, to download the product information sheet or provide the EnergyGuide label, product packaging, appliance or user manual showing the ENERGY STAR® logo (with the model number clearly indicated)</b></li> <li>◆ <b>Small commercial business:</b> <ul style="list-style-type: none"> <li>○ Current business license</li> <li>○ VI WAPA electric bill</li> </ul> </li> <li>◆ <b>Non-profit or Not-for-Profit:</b> <ul style="list-style-type: none"> <li>○ 501(c)(3) Verification Letter</li> <li>○ Articles of Incorporation</li> <li>○ Certificate of Good Standing</li> </ul> </li> </ul> <p><b>If you have any questions or need further assistance, please call our office in St. Croix at (340) 713-8436 or St. Thomas at (340) 714-8436.</b></p>	<ul style="list-style-type: none"> <li>◆ <b>REBATES ARE SUBJECT TO THE AVAILABILITY OF FEDERAL FUNDS. THEREFORE, THIS PROGRAM MAY BE TERMINATED AT ANY TIME WITHIN THE PROGRAM CYCLE.</b></li> <li>◆ <b>All eligible items MUST be purchased from a business in the U.S. Virgin Islands.</b></li> <li>◆ The eligible rebate amount <b>cannot exceed \$5,000 per household per program cycle.</b></li> <li>◆ The VIEO reserves the right to share payment (rebate) information with the VI Bureau of Internal Revenue.</li> <li>◆ The VIEO reserves the right to inspect items to ensure that they are installed at the address listed on the rebate application. <i>Non-compliance will result in a request for the return of funds by the applicant and/or prosecution for fraud.</i></li> <li>◆ <b>Solar water heater systems must be installed and operational within 60 days of the purchase date.</b> Once the system(s) are installed, the vendor or applicant must notify the VIEO to schedule an inspection. <b>Rebates will only be issued on operational ICC-SRCC™ rated systems verified by a VIEO site inspection.</b></li> <li>◆ Pursuant to federal law 10 CFR§ 420.13(b)(6): The VIEO State Energy Program (SEP) will not implement any market title activity involving the purchase or installation of materials or equipment to weatherize or otherwise supplement its existing Weatherization Program(s) targeting low-income households.</li> <li>◆ <b>The VIEO reserves the right to add, delete or change the program rules at our discretion. Modification to the rebate application is not allowed.</b></li> </ul>

## Request for Taxpayer Identification Number and Certification

**Give Form to the  
 requester. Do not  
 send to the IRS.**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type.  
See Specific Instructions on page 3.

	<b>1</b> Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	<b>2</b> Business name/disregarded entity name, if different from above	
	<b>3</b> Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate  <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.  <input type="checkbox"/> Other (see instructions) ▶ _____	<b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any) _____  Exemption from FATCA reporting code (if any) _____  <i>(Applies to accounts maintained outside the U.S.)</i>
	<b>5</b> Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
	<b>6</b> City, state, and ZIP code	
	<b>7</b> List account number(s) here (optional)	

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

<b>Social security number</b>					
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%; border: 1px solid black; height: 20px;"></td> <td style="width: 2%; text-align: center;">-</td> <td style="width: 25%; border: 1px solid black; height: 20px;"></td> <td style="width: 2%; text-align: center;">-</td> <td style="width: 46%; border: 1px solid black; height: 20px;"></td> </tr> </table>		-		-	
	-		-		
<b>or</b>					
<b>Employer identification number</b>					
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%; border: 1px solid black; height: 20px;"></td> <td style="width: 2%; text-align: center;">-</td> <td style="width: 73%; border: 1px solid black; height: 20px;"></td> </tr> </table>		-			
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### Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

**Sign Here**

Signature of U.S. person ▶

Date ▶

## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)  
 Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*