



# CREDIT APPLICATION

**RISE ENGINEERING** This is not a contract for a loan nor does it lock you into any commitment with a contractor. This is an application that will allow us to proceed with your request for a loan to finance your improvement(s). This will include reviewing your credit history.

Please complete all fields. Incomplete applications will be returned to you for completion. Requests for loans greater than \$4,000 require proof of income (such as recent pay stub, or if self-employed, a copy of your previous years federal tax return). Only residential work that has not been started is eligible for financing. Upon completion of the application, please submit all requested items to:

**Address: Energy Finance Solutions - 431 Charmany Drive, Madison, WI 53719 or fax to: (608) 249-5788**  
**Apply online at: [www.energyfinancesolutions.com](http://www.energyfinancesolutions.com)**

| SECTION A - INDIVIDUAL APPLICANT INFORMATION  |  |  |                           |   |                                   |   |   |   |   |                           |
|---|--|--|---------------------------|---|-----------------------------------|---|---|---|---|---------------------------|
| <i>Mr/Mrs/Ms</i>  |  | <i>Last Name</i>                                   |                           |   | <i>First Name</i>                 |   |   | <i>MI</i>   | <i>Jr/Sr/I/II</i>   |                           |
| <i>Birth Date</i>   |  | <i>Home Phone</i>                                  |                           | <i>Social Security Number</i>   |                                   | <i>Marital Status</i> (only for residents of: AZ, CA, ID, LA, NV, NM, TX, WA, WI)<br><input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> UnMarried (single, divorced, widowed) |   |   |   |                           |
| <i>Installation Address (where home improvements are to be made)</i>  |  |  |                           |   | <i>Unit #</i>                     |   | <i>City</i>                                       |   | <i>State</i>  | <i>Zip</i>                |
| <i>Do You Currently</i><br><input type="checkbox"/> Own <input type="checkbox"/> Rent   |  | <i>Years at Current Address</i>                    |                           | <i>Do or Will you own and reside at the above installation address?</i><br><input type="checkbox"/> Yes <input type="checkbox"/> No |                                   | <i>Dwelling Type (Multi (3 units +) does not qualify)</i><br><input type="checkbox"/> Single Family <input type="checkbox"/> Duplex <input type="checkbox"/> Condo  |   | <i>Mo. Mortgage Payment (including taxes)</i><br>\$ |   |                           |
| <i>Current Address (if different than the above Installation Address)</i>   |  |  |                           |   | <i>City</i>                       |   | <i>State</i>                                      | <i>Zip</i>  |   |                           |
| <i>Mailing Address (if different than the above Current Address)</i>  |  |  |                           |   | <i>City</i>                       |   | <i>State</i>                                      | <i>Zip</i>  |   |                           |
| <i>Employer Name / Company</i>  |  |  | <i>Employer's Address</i> |   |                                   | <i>City</i>   |   | <i>State</i>  | <i>Zip</i>  | <i>How Long Employed?</i> |
| <i>Business Phone</i>   |  | <i>Ext</i>   | <i>Position or Title</i>  |   | <i>Monthly Gross Salary</i><br>\$ |   | <i>Circle One Below</i><br>FullTime PartTime Both |   | <i>Are you Self-Employed?</i><br><input type="checkbox"/> Yes <input type="checkbox"/> No |                           |
| <i>Employment Category Number (see 2nd page)</i>  |  | <i>Employment Occupation Number (see 2nd page)</i> |                           | <i>Sources of Other Income</i>  |                                   |   |   | <i>Monthly Gross Salary</i><br>\$                   |   |                           |
| Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.<br>Alimony, child support, separate maintenance received under: <input type="checkbox"/> Court Order <input type="checkbox"/> Written Agreement <input type="checkbox"/> Oral Understanding |  |  |                           |   |                                   |   |   |   |   |                           |

| SECTION B - JOINT APPLICANT   |  |  |                           |   |                                   |   |   |                                   |   |                           |
|---|--|--|---------------------------|---|-----------------------------------|---|---|-----------------------------------|---|---------------------------|
| Complete only for joint credit (If Joint Applicant is a Co-Borrower/Spouse then they must own and occupy the home at the above installation address.)   |  |  |                           |   |                                   |   |   |                                   |   |                           |
| <i>Mr/Mrs/Ms</i>  |  | <i>Last Name</i>                                   |                           |   | <i>First Name</i>                 |   |   | <i>MI</i>                         | <i>Jr/Sr/I/II</i>   |                           |
| <i>Birth Date</i>   |  | <i>Home Phone</i>                                  |                           | <i>Social Security Number</i>   |                                   | <i>Marital Status</i> (only for residents of: AZ, CA, ID, LA, NV, NM, TX, WA, WI)<br><input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> UnMarried (single, divorced, widowed) |   |                                   |   |                           |
| <i>Current Address (if different than the above Installation Address)</i>   |  |  |                           |   | <i>City</i>                       |   | <i>State</i>                                      | <i>Zip</i>                        |   |                           |
| <i>Do You Currently</i><br><input type="checkbox"/> Own <input type="checkbox"/> Rent   |  | <i>Years at Current Address</i>                    |                           | <i>Do or Will you own and reside at the above installation address?</i><br><input type="checkbox"/> Yes <input type="checkbox"/> No |                                   |   |   |                                   |   |                           |
| <i>Employer Name / Company</i>  |  |  | <i>Employer's Address</i> |   |                                   | <i>City</i>   |   | <i>State</i>                      | <i>Zip</i>  | <i>How Long Employed?</i> |
| <i>Business Phone</i>   |  | <i>Ext</i>   | <i>Position or Title</i>  |   | <i>Monthly Gross Salary</i><br>\$ |   | <i>Circle One Below</i><br>FullTime PartTime Both |                                   | <i>Are you Self-Employed?</i><br><input type="checkbox"/> Yes <input type="checkbox"/> No |                           |
| <i>Employment Category Number (see 2nd page)</i>  |  | <i>Employment Occupation Number (see 2nd page)</i> |                           | <i>Sources of Other Income</i>  |                                   |   |   | <i>Monthly Gross Salary</i><br>\$ |   |                           |
| Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.<br>Alimony, child support, separate maintenance received under: <input type="checkbox"/> Court Order <input type="checkbox"/> Written Agreement <input type="checkbox"/> Oral Understanding |  |  |                           |   |                                   |   |   |                                   |   |                           |

**EMPLOYMENT CATEGORIES**

|   |   |  |
|---|---|--|
| 1 = Agriculture<br>2 = Construction<br>3 = Mining | 4 = Manufacturing<br>5 = Finance, Insurance, Real Estate<br>6 = Wholesale Trade | 7 = Retail Trade<br>8 = Services<br>9 = Government |
|---|---|--|

**EMPLOYMENT OCCUPATIONS**

|   |  |  |
|---|--|--|
| 100 = Executive<br>101 = Manager/Supervisors<br>102 = Analyst/Specialists<br>103 = Professionals<br>104 = Scientists<br>105 = Technicians/Assistants<br>106 = Medical Practitioners<br>107 = Social/Religious Workers | 108 = Legal Practitioners<br>109 = Teachers<br>110 = Arts/Entertainment/Media<br>111 = Sales Persons<br>112 = Household/Personal Care<br>113 = Clerical Workers<br>114 = Administrative/Secretarial<br>115 = Protective Services | 116 = Food Services<br>117 = Skilled Trader Laborers<br>118 = Production Workers<br>119 = Retired<br>120 = Self-Employed<br>121 = Enlisted Military<br>122 = Unemployed<br>123 = Student |
|---|--|--|

**SECTION C - UTILITY INFORMATION**

|                             |                        |  |  |
|-----------------------------|------------------------|--|--|
| <i>Electric Utility Co.</i> | <i>Gas Utility Co.</i> | <i>Water Heating Fuel Type (circle one)</i><br>Natural Gas   Electric   LP   Oil   Other | <i>Space Heating Fuel Type (circle one)</i><br>Natural Gas   Electric   LP   Oil   Other |
|-----------------------------|------------------------|--|--|

**SECTION D - MEASURES INSTALLATION INFORMATION**

(Please print clearly and include a copy of your contractor's estimate, if available at this time)

| <i>Measure(s) To Be Installed</i> | <i>Efficiency Level</i> | <i>Contractor Doing the Work (name/address)</i> | <i>Total Cost*</i> |
|-----------------------------------|-------------------------|---|--------------------|
|                                   |                         |   | \$                 |
|                                   |                         |   | \$                 |
|                                   |                         |   | \$                 |

\* include any associated costs such as venting, wiring or other electrical work, warranties, etc.

**TOTAL COST:** \$**SECTION E - LOAN TERM DESIRED****Select Desired Loan Term:**     3 Years    5 Years    7 Years    10 Years**SECTION F - ASSET AND DEBT INFORMATION**

(If Section B has been completed, include information about both the Applicant and Joint Applicant)

**ASSET TOTAL***Total Assets (checking balance + savings balance + house + automobile + other assets):*    \$**OUTSTANDING DEBTS**    *(Attach Additional Sheet if needed)*

| <i>Creditor</i>  | <i>Account Number</i>                  | <i>Name in which the account is carried</i> | <i>Monthly Payments</i>        | <i>Current Value (Balance)</i> |
|--|--|---|--------------------------------|--------------------------------|
| <i>Mortgage Holder</i>   |  |   | <i>(including taxes)</i><br>\$ | \$                             |
| <i>Automobile(s)</i>   |  |   | \$                             | \$                             |
|  |  |   | \$                             | \$                             |
| <i>Are you obligated to make Alimony, Support or Maintenance Payments?</i><br><input type="checkbox"/> Yes <input type="checkbox"/> No | <i>If yes, to whom (Name/Address)?</i> |   |                                | <i>Amount per Month</i><br>\$  |
| <i>Are you a co-maker, endorser, or guarantor on any loan or contract?</i><br><input type="checkbox"/> Yes <input type="checkbox"/> No | <i>If yes, for whom?</i>               | <i>To whom?</i>                             |                                | <i>Amount per Month</i><br>\$  |
| <i>Are there any unsatisfied judgements against you?</i><br><input type="checkbox"/> Yes <input type="checkbox"/> No                   | <i>If yes, to whom owed?</i>           |   |                                | <i>Total Amount Owed</i><br>\$ |
| <i>Have you declared bankruptcy in the last 7 years?</i><br><input type="checkbox"/> Yes <input type="checkbox"/> No                   | <i>If yes, what city/state?</i>        |   |                                | <i>Year</i>                    |

**SIGNATURES**

All information provided on this application is correct. My (our) signature below authorizes WECC/EFS to perform a review of my credit history for the purpose of approving the loan I am requesting. The Federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applications on the basis of sex or marital status.

Applicant's Signature

Date

Joint Applicant Signature

Date