Who am I?

Design-Manage-Sustain

1. Energy finance programs
   - Design
   - Implement
   - Manage
2. Contractor training
3. Marketing & outreach

Qualifications

- Master in Architecture, AIA
- LEED AP
- Project Management ProfessionalCertification
- Sustainable design and construction since 2000

WHY?? … is financing important?

- ✓ More comprehensive projects = more energy savings
- ✓ Better equipment = more energy savings
- ✓ Preserve cash flow
- ✓ Lower operational costs
- ✓ Better future utility cost planning
- ✓ Increase property value
- ✓ Pass cost to renter/tenants

Session Goals

- ✓ Financing is part of a holistic solution
- ✓ Wide range of finance products
- ✓ Key information resources
- ✓ Next steps for LGs

What else is out there?

GoGreenFinancing.com

Lending Solutions For Your Home And Business

To help you find the best financing options available for your energy efficiency project, Energy Upgrade California has created Go Green Financing. This website allows California residents and businesses to browse our database of financing solutions and filter the various options down to a more manageable number, making it easy to get in touch with a lender that fits your own unique needs and preferences.

We Recommend that You Start With the Following Options:

STEP 1

CREATE MY PERSONAL ENERGY PLAN

Build a personalized MyEnergyUpgrade action plan that will help you reach your energy goals, whether they are to save money, reduce your carbon footprint, or increase the health, comfort and safety of your property.

Leverage Your Action Plan

STEP 2

FINANCING DECISION-MAKING ASSISTANCE

Need help deciding between all of the financing options available? The Finance Decision-Making Assistance tool can help you rank, prioritize and choose from the many different options to find the most appropriate solution for your custom needs.

Get Assistance

STEP 3

FIND FINANCING

Explore our database of energy project financing options organized by category. Select several options to compare products side-by-side or click on an individual financing option to view more detailed information and terms.

Explore all Financing

Financing Finder

Find and compare financing options available near you.

Single family Residential | Search by City & Zip | Aliso Viejo | 92656 | Search | Reset >

PACE

Property Assessed Clean Energy (PACE) financing is an innovative financing option where the loan is repaid via an annual assessment on your property tax bill. PACE is a secured loan that attaches to the property and is repaid through its property tax bill. As a result, it may be transferred to the new owner upon sale of the property.

Eligibility Req: Property must be located in a local jurisdiction that has approved a resolution by City or County Council.
Improvements: Approved measure list available on PACE provider's websites - energy efficiency, water efficiency, renewable energy & demand response.

Providers ▸ | Compare Now

Vendor	Financing Available	Duration	Compare	
CaliforniaHERO (Residential) hero Financing Program EE WE RE DR OE ER	$5,000 - 15% of property value	15 year(s)		Details ▸
	$5,000 - 15% of property value	5 year(s)		Details ▸
	$5,000 - 15% of property value	20 year(s)		Details ▸
	$5,000 - 15% of property value	10 year(s)		Details ▸
CaliforniaFIRST (Residential) CaliforniaFIRST EFFICIENCY FINANCING EE WE RE DR OE ER	$5,000 - $200,000	20 year(s)		Details ▸
	$5,000 - $200,000	25 year(s)		Details ▸
	$5,000 - $200,000	10 year(s)		Details ▸
	$5,000 - $200,000	15 year(s)		Details ▸
	$5,000 - $200,000	5 year(s)		Details ▸
Figtree Financing (Residential) Figtree FINANCING EE WE RE DR OE ER NE	$2,500 - 10% of property value	10 year(s)		Details ▸
	$2,500 - 10% of property value	5 year(s)		Details ▸
	$2,500 - 10% of property value	15 year(s)		Details ▸
	$2,500 - 10% of property value	25 year(s)		Details ▸

Support

- Searchable database of financing options
- Filtered by property & location
- Organized by type
- Ability to compare products
- View product details
- Contact lender or apply now

Finance Concierge

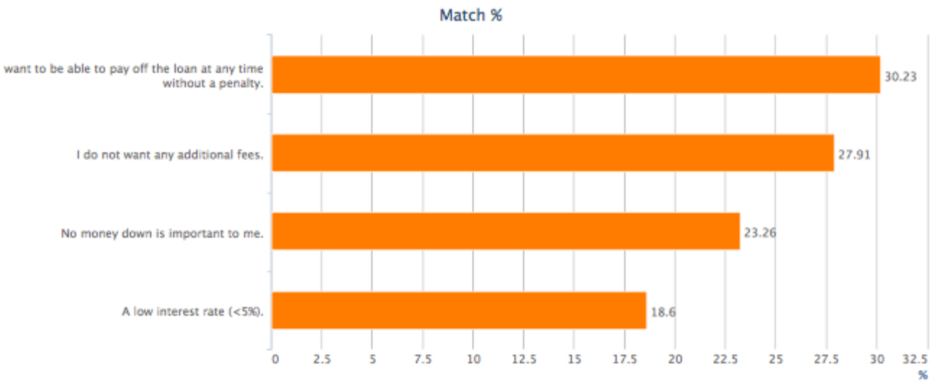
Start | Criteria | Decisions | **Products** | Info

Email Results | Print Results

Reset and Start Over

How do your decisions weigh up?

See how your decisions weigh in on each of the topics you said were important to you.



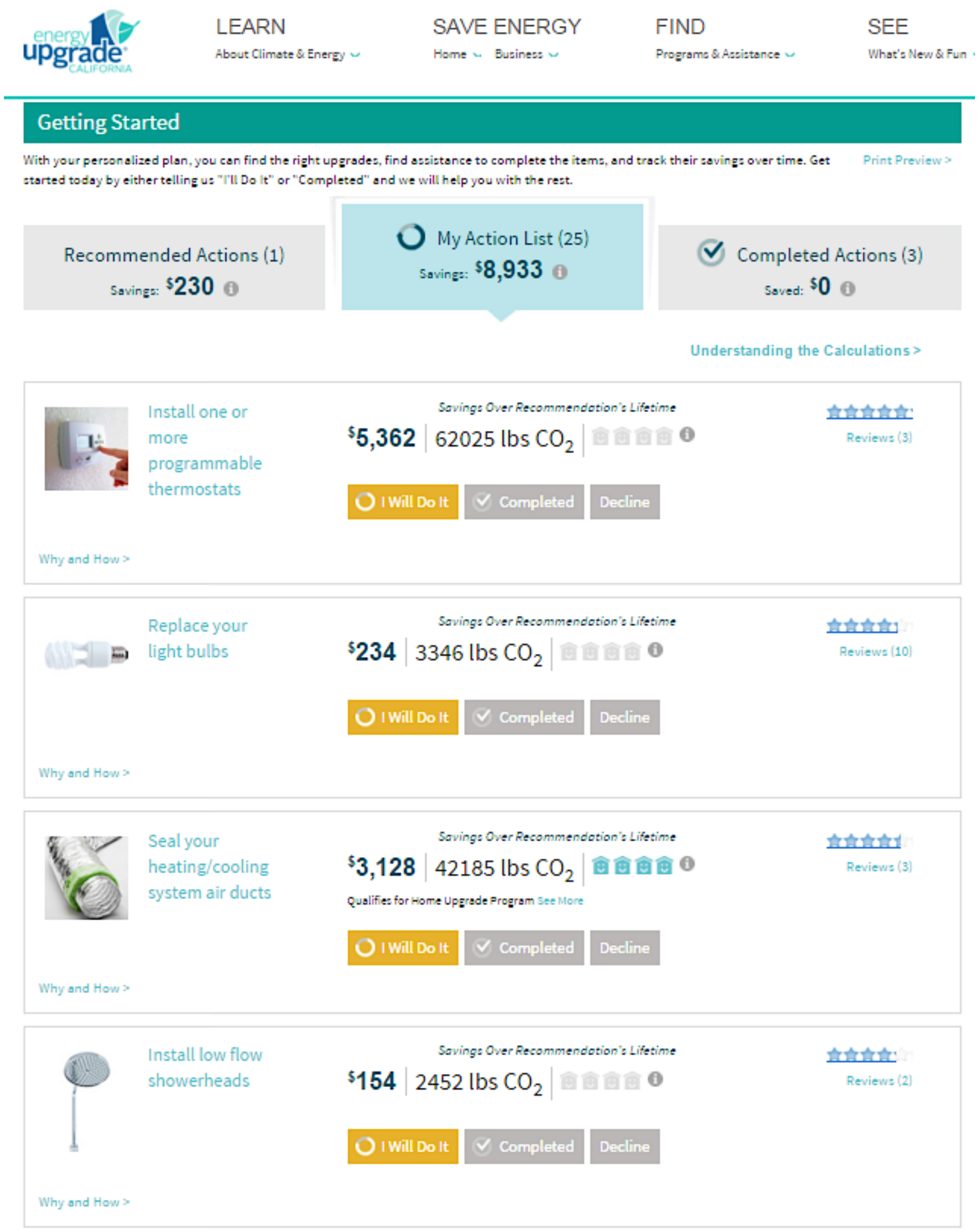
Finance Product Ranking

Here is the ranking of available finance products according to what you told us is most important to you. Click on product names to get additional information and begin applying for products that most interest you.

Rank	Match %	Finance Product Name	Duration	Financing Available	Est. Payment per Month
1	93%	On Bill Financing (Business) - SDG&E	3 year(s)	5000 - 100000	N/A
	93%	On Bill Financing (Business) - SDG&E	5 year(s)	5000 - 100000	N/A
2	84%	Imortgage Unsecured Personal Loan	15 year(s)	5000 - 35000	Below minimum amount (at 15 years)
	84%	Imortgage Unsecured Personal Loan	30 year(s)	5000 - 35000	Below minimum amount (at 30 years)
	63%	CaliforniaFIRST (Residential)	5 year(s)	5000 - 200000	Below minimum amount (at 5 years)

- Finance decision-making assistance tool.
- Asks about credit background.
- Asks for preferences.
- Creates a customized list of products matching your preferences.
- Provides estimated payment.

My Action Plan



- Quick assessment tool
- Personalize your action plan.
- Informs the Finance Concierge
- Determines potential loan amount for estimated payment information.

Earn $2000 to market financing!

- $2,000 just for enrolling!
- Redeemable for customizable marketing materials
- Only requirement = provide metrics for reporting

APPLY FOR A $20,000 MICRO-GRANT!

energy upgrade CALIFORNIA

State of Saving - Campaign

Saving is second nature for Californians. We save the water. We save the air. And in some cases, we even save the sun, bottle it up and sell it right back to the grid to save some energy. We save because we simply love where we live. And want to save it for generations to come.

Energy Upgrade California® will connect you to excellent loans with better rates so you can save money on your home, while you go about your job of saving the state.

Key Take Aways

- ✓ Financing is part of a holistic solution
- ✓ Wide range of finance products
- ✓ Key information resources
- ✓ Next steps for LGs

Thank You

DESIGN
MANAGE
SUSTAIN

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We work nationally in the clean energy industry and are always open to exploring partnership opportunities.