



# BLOOMINGTON GREEN HOME IMPROVEMENT PROGRAM

**This rebate agreement for the Bloomington Green Home Improvement Program (BGHIP) includes three components:**

• **A certification** that one has completed a project as part of the BGHIP program, including receiving and closing a loan through the Clean Energy Credit Union or Hoosier Hills Credit Union. This verification has been pre-signed by the City of Bloomington Controller and the Director of Economic and Sustainable Development, and signing it constitutes an agreement that the terms listed have been met.

• **W-9 form:** The rebate is taxable income and should be reported as such. When completing this form:

- Leave "business name" blank
- Check "individual" for business type
- List "Economic & Sustainable Development" as the department one is doing business with
- List "participated in Bloomington Green Home Improvement Program" for commodities and services provided.
- Leave NAICS Code and DUNS Number blank
- Please fill in your SSN or Employer Identification Number

• **EFT form:** The rebate will be direct deposited into your bank account. When completing this form:

- Leave the references section blank
- List "\$1,000" for payment remittance
- Please fill in your address under billing information

Please submit this form by email to [esdgrants@bloomington.in.gov](mailto:esdgrants@bloomington.in.gov).

Please note that completion of this form does not guarantee receipt of the \$1,000 rebate, as the rebates are limited to the first 75 borrowers (based on order of intake form submission).

**For questions regarding filling out this form or the availability of rebates, please email [sustain@bloomington.in.gov](mailto:sustain@bloomington.in.gov).**



# BLOOMINGTON GREEN HOME IMPROVEMENT PROGRAM

## Bloomington Green Home Improvement Program: Rebate Agreement

This agreement certifies that the applicant meets the following requirements for the Bloomington Green Home Improvement Program rebate:

- Is a resident of Bloomington, Indiana
- Owns their home *or* owns their home with a mortgage
- Had a 2022 household income under \$150,000
- Received a Solar, Geothermal, and/or Green Home Improvement Loan through the Clean Energy Credit Union or Hoosier Hills Credit Union in 2023 (indicate CECU or below with a check mark

Clean Energy Credit Union (CECU)       Hoosier Hills Credit Union (HHCU)

In accordance with the Bloomington Green Home Improvement Program, \_\_\_\_\_ (program participant name) will be issued a \$1,000 rebate by Electronic Funds Transfer (EFT) within the next ninety (90) calendar days for solar, geothermal, and/or green home improvements made in 2023. Limit one \$1,000 rebate per household.

\_\_\_\_\_  
Program Participant Signature

\_\_\_\_\_  
Printed Name

Pierre A.J. Crowley, City of Bloomington Director of Economic & Sustainable Development

Jeffrey H. Underwood, CPA  
Jeffrey H. Underwood, CPA (Aug 17, 2021 12:49 EDT)

Jeffrey Underwood, City of Bloomington Controller



**JOHN HAMILTON  
MAYOR**

CITY OF BLOOMINGTON CONTROLLER'S OFFICE

401 N Morton St  
Post Office Box 100  
Bloomington IN 47402

**SUBSTITUTE W-9 & BANK/EFT FORM**

(red boxes are required fields)

(Complete and Save form. Email or Fax to Controller's Office)

p 812.349.3412  
f 812.349.3456  
controller@bloomington.in.gov

**REQUEST FOR TAXPAYER IDENTIFICATION NUMBER AND CERTIFICATION: SUBSTITUTE W-9**

<b>Name (as shown on your tax return):</b>												
<b>Business Name/DBA (if different than above):</b>												
<b>Check appropriate box for federal tax classification:</b>		<b>Exemptions:</b> Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____										
<input type="checkbox"/> Individual/sole proprietor <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. <b>Enter the tax classification</b> (C=C corporation, S=S corporation, P=Partnership) ▶ _____												
<input type="checkbox"/> Other ▶ _____												
<b>Address (number, street, and apt. or suite no.):</b>												
<b>City, State, and ZIP code:</b>												
<b>Telephone number:</b>	<b>Fax number:</b>	<b>Email:</b>										
<b>Check all that apply:</b>												
<input type="checkbox"/> State or Local Government <input type="checkbox"/> City Employee <input type="checkbox"/> Contractual Employee <input type="checkbox"/> Farmer's Market Vendor <input type="checkbox"/> Not for Profit - 501(c)												
<b>List city department(s) you are doing business with (Parks, Fire, Utilities etc.):</b>	<b>Commodities or Services provided:</b>											
	<b>Primary NAICS Code:</b>	<b>DUNS #:</b>										
<b>Taxpayer Identification Number (TIN)</b>		<b>Social security number</b>										
Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line To avoid backup withhold. For individuals, this is your social security number (SSN). However, for a Resident alien, sole proprietor, or disregarded entity, see the Part 1 instructions on page 3 of IRS Form W-9. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> on page 3 of IRS Form W-9		<table border="1" style="width:100%; border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;">-</td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;">-</td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> </tr> </table>				-			-			
			-			-						
		<b>Employer identification number</b>										
		<table border="1" style="width:100%; border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;">-</td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> </tr> </table>				-						
			-									
<b>Note:</b> If the account is in more than one name, see the instructions for line 1 and the chart on page 4.												

**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. person or other U.S. person (defined below), and
4. The FATCA codes(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 on page 3 of the IRS Form W-9.

Please mail or fax this complete form as soon as possible to the Controller's Office using the contact information above.

**NO PAYMENTS WILL BE SENT UNTIL THIS FORM IS RECEIVED.**

SIGN HERE	Signature of U.S. person ▶	Date ▶
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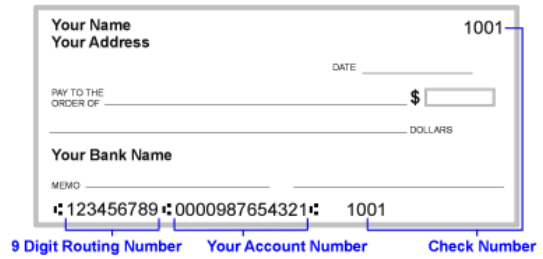


# CITY OF BLOOMINGTON ELECTRONIC FUNDS TRANSFER FORM (EFT)

(Complete and Save form and attach to email)  
Email completed forms to: [controller@bloomington.in.gov](mailto:controller@bloomington.in.gov)  
Call 812-349-3412 if you have any questions.

THE CITY'S PREFERRED METHOD OF VENDOR PAYMENT IS ELECTRONIC FUNDS TRANSFER (EFT) DIRECTLY TO THE VENDOR'S BANK. NO PAPER CHECKS WILL BE ISSUED WITHOUT THE APPROVAL OF THE CONTROLLER.

**PLEASE COMPLETE THE SECTION BELOW TO ENROLL**



## **EFT INFORMATION**

Bank Name:
Type of Account: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
Routing Number:
Account Number:
Name of Account:
Email for Payment Notification:

## **REFERENCES FOR SOLE PROPRIETORS & PARTNERSHIPS**

Name:	Address:
Phone:	Email:
Name:	Address:
Phone:	Email:
Name:	Address:
Phone:	Email:

## **BILLING INFORMATION**

Payment Remittance
Address (Mailing)
Address (Physical)
City
Person to Contact
Email
Phone

(Complete and Save form. Attach form and email to [controller@bloomington.in.gov](mailto:controller@bloomington.in.gov) or print and fax to 812.349.3456)