



# Sales Agency Engagement Form

Please email the completed form to [Agency@yourfamilyenergy.com](mailto:Agency@yourfamilyenergy.com)

## Primary Contact Information

Name \_\_\_\_\_

Title \_\_\_\_\_

Telephone \_\_\_\_\_

Cell Number \_\_\_\_\_

Email address \_\_\_\_\_

## Agency Information

Legal Entity Name \_\_\_\_\_

Organized under the laws of \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip Code \_\_\_\_\_

Office Telephone \_\_\_\_\_

Office Fax Number \_\_\_\_\_

Tax ID \_\_\_\_\_

Email Address \_\_\_\_\_

Website \_\_\_\_\_

(if different than primary contact)

Organization Type  Corp  LLC  Partnership  Sole Proprietor  Other \_\_\_\_\_

Does your company currently hold a valid commercial liability insurance policy?  Yes  No

# of Years in Business \_\_\_\_\_

# of Employees \_\_\_\_\_

# of Sales Reps \_\_\_\_\_

Agency Marketing Channel  Door-to-Door (Residential)  Telemarketing  Commercial

## Background Information

1. What markets have you sold in?

\_\_\_\_\_

2. What markets are you currently licensed in? (Please list all Broker/Agent licenses by market)

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3. What market do you currently sell in?

\_\_\_\_\_

4. What markets are you interested in selling in?

\_\_\_\_\_

5. What ESCO's have you worked for?

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6. Describe the Organization's energy-related experience and industry knowledge.

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7. Please identify the market segment in usage thresholds that the Organization targets.

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8. Please describe the Organization's core business function.

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9. What is the primary focus of your business? (i.e. residential, schools, real estate, etc.)

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10. What are the anticipated sales results on an annual basis in terms of number of customers and MWh volume?

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11. Please provide details on your sales market strategy for customer acquisition (i.e. door-to-door, cold calling, referrals, etc).

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12. Has the Organization ever had a broker agreement terminated by a supplier? If yes, please explain.

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13. Is the Organization or any employee of the Organization subject to any enforcement or disciplinary action by a regulatory body of the subject to any pending or threatened lawsuit, action, or any legal proceeding related to its/their business conduct? Has the Organization or any employees of the Organization been the subject of any such actions in the past three (3) years? If yes, please explain.

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14. Is the Organization subject to any non-compete and/or non-disclosure agreements that would affect the services that you would provide for SFE and FE Energy? If yes, Please explain.

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15. Have you ever been convicted of, or plead guilty or no contest to or have been the subject of a finding of guilt by a judge or jury to a criminal offense other than a minor traffic violation? If yes, please provide details of all offenses including nature, circumstances, and dates.

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16. Please provide a list of all Officers and Directors for your company and any other information pertinent to this application

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