



## CUSTOMER INFORMATION FORM

TO: **XOOM Energy - Commercial Division**

IBO NAME: \_\_\_\_\_

FAX: **866.452.0053**

IBO #: \_\_\_\_\_

DATE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

# OF PAGES: \_\_\_\_\_

PHONE: \_\_\_\_\_

Company Name: \_\_\_\_\_

Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Currently buying energy from:  Utility  
 Supplier/Retailer

**Notes:**

If Retailer:

Who: \_\_\_\_\_

Are you under contract? No:  Yes:  If yes, what is the contract expiration date? / /

**Threshold for large commercial accounts is \$2,000-\$35,000/month of commodity usage.**

**Please make sure you include all of the items below when submitting your information:**

- Big Business Program Customer Information Form Completed
- Letter of Authorization (LOA) Form Completed AND Signed (one form per utility)
- Copy of Your Most Recent Natural Gas Invoice/ Statement

Check the Utility:

- PG&E**
- SoCal**
- SDG&E**

### PLEASE NOTE:

- ACN/XOOM Energy does not forward or keep incomplete documents; if your Big Business Program Package is incomplete you will be required to resend the entire package.
- XOOM Energy is not able to provide service to all types of businesses.
- The Letter of Authorization (LOA) is mandated by the state and required by the utility to release information to XOOM Energy should you choose that option to provide your historical usage information. XOOM Energy cannot modify the LOA.
- Completing the Letter of Authorization (LOA) in no way affects your current provider relationship or obligates you to transfer your account or purchase energy from XOOM Energy.
- The reference to potential cost in the INFORMATION, ACTS AND FUNCTIONS AUTHORIZED section of the Letter of Authorization (LOA) is strictly limited to the possibility that your utility may charge a fee for providing copies of your historic usage information. This is not typical, does not benefit XOOM Energy in any way, and is included to protect the utility in the event they opt to charge fees.



Thank you for your interest in XOOM Energy. To proceed in ACN/XOOM Energy's Big Business Program, please complete the following forms as instructed below. XOOM Energy's Big Business Process requires historical usage information to create a quote specific to your energy needs.

**1 Complete Customer Information Form**

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**2 Complete the Letter of Authorization:**

- A** You must complete a separate LOA for each legal entity(s) you enroll.
  - B** Complete the Personal Information section.
  - C** List the accounts for which a quote is requested. If you wish to receive a quote for more than three accounts, please list additional accounts on the corresponding utility information page provided and attach it to the LOA.
  - D** Print name.
  - E** Sign and Date.
  - F** Leave blank (for XOOM Energy use only).
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**3 Provide the most recent natural gas or electricity invoice/statement for each of the listed accounts/meters.**

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**4 Fax all documents to ACN/XOOM Energy at **866.452.0053**.**



**SAMPLE**

**AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION OR ACT ON A CUSTOMER'S BEHALF**

**I (CUSTOMER) AUTHORIZE THE RELEASE OF MY ACCOUNT INFORMATION AND AUTHORIZE MY AGENT TO ACT ON MY BEHALF ON THE FOLLOWING BASIS<sup>2</sup> (initial one box only):**

<sup>2</sup>If no time period is specified, authorization will be limited to a one-time authorization

One time authorization only (limited to a one-time request for information and/or the acts and functions specified above at the time of receipt of this Authorization).

One year authorization - Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the twelve month period from the date of execution of this Authorization.

Authorization is given for the period commencing with the date of execution until \_\_\_\_\_ (Limited in duration to three years from the date of execution.) Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the authorization period specified herein.

**RELEASE OF ACCOUNT INFORMATION:**

**The Utility will provide the information requested above, to the extent available, via any one of the following. My (Agent) preferred format is (check all that apply):**

Hard copy via US Mail (if applicable).

Facsimile at this telephone number: \_\_\_\_\_

Electronic format via electronic mail (if applicable) to this e-mail address: BBPINFO@XOOMENERGY.COM

**D** I (Customer), \_\_\_\_\_ (print name of authorized signatory), declare under penalty of perjury under the laws of the State of California that I am authorized to execute this document on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I further certify that my Agent has authority to act on my behalf and request the release of information for the accounts listed on this form and perform the specific acts and functions listed above. I understand the Utility reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. I authorize the Utility to release the requested information on my account or facilities to the above Agent who is acting on my behalf regarding the matters listed above. I hereby release, hold harmless, and indemnify the Utility from any liability, claims, demands, causes of action, damages, or expenses resulting from: 1) any release of information to my Agent pursuant to this Authorization; 2) the unauthorized use of this information by my Agent; and 3) from any actions taken by my Agent pursuant to this Authorization, including rate changes. I understand that I may cancel this authorization at any time by submitting a written request. **[This form must be signed by someone who has authority to financially bind the customer (for example, CFO of a company or City Manager of a municipality).]**

**E** Executed this \_\_\_\_\_ day of \_\_\_\_\_ at \_\_\_\_\_  
AUTHORIZED CUSTOMER SIGNATURE \_\_\_\_\_ TELEPHONE NUMBER \_\_\_\_\_  
MONTH YEAR CITY AND STATE WHERE EXECUTED

I (Agent), hereby release, hold harmless, and indemnify the Utility from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this authorization and from the taking of any action pursuant to this authorization, including rate changes.

**F** \_\_\_\_\_  
AGENT SIGNATURE \_\_\_\_\_ TELEPHONE NUMBER **704.274.1450**  
**XOOM Energy - California, LLC ("XOOM Energy")**  
COMPANY

Executed this \_\_\_\_\_ day of \_\_\_\_\_  
MONTH YEAR

# AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION OR ACT ON A CUSTOMER'S BEHALF

SUBMITTED TO THE FOLLOWING.

Please check all that apply:

- PG&E                       SoCalGas  
 SCE                               SDG&E

THIS IS A LEGALLY BINDING CONTRACT—READ IT CAREFULLY  
 (Please Print or Type)

I, \_\_\_\_\_ NAME \_\_\_\_\_ TITLE (IF APPLICABLE)

of \_\_\_\_\_ (Customer) have the following mailing address  
 NAME OF CUSTOMER OF RECORD

\_\_\_\_\_, and do hereby appoint  
 MAILING ADDRESS CITY STATE ZIP

**XOOM Energy - California, LLC ("XOOM Energy")** of **11208 STATESVILLE ROAD, SUITE 200**  
 NAME OF THIRD PARTY MAILING ADDRESS  
**HUNTERSVILLE NC 28078**  
 CITY STATE ZIP

to act as my agent and consultant (Agent) for the listed account(s) and in the categories indicated below:

## ACCOUNTS INCLUDED IN THIS AUTHORIZATION:

1. \_\_\_\_\_ SERVICE ADDRESS CITY SERVICE ACCOUNT NUMBER
2. \_\_\_\_\_ SERVICE ADDRESS CITY SERVICE ACCOUNT NUMBER
3. \_\_\_\_\_ SERVICE ADDRESS CITY SERVICE ACCOUNT NUMBER

(For more than three accounts, please list additional accounts on a separate sheet and attach it to this form)

**INFORMATION, ACTS AND FUNCTIONS AUTHORIZED – This authorization provides authority to the Agent. The Agent must thereafter provide specific written instructions/requests (e-mail is acceptable) about the particular account(s) before any information is released or action is taken. In certain instances, the requested act or function may result in cost to you, the customer. Requests for information may be limited to the most recent 12 month period.**

I (Customer) authorize my Agent to act on my behalf to perform the following specific acts and functions (initial all applicable boxes):

1. Request and receive billing records, billing history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility<sup>1</sup>.
2. Request and receive copies of correspondence in connection with my account(s) concerning (initial all that apply):
- a. Verification of rate, date of rate change, and related information;
  - b. Contracts and Service Agreements;
  - c. Previous or proposed issuance of adjustments/credits; or
  - d. Other previously issued or unresolved/disputed billing adjustments.
3. Request investigation of my utility bill(s).
4. Request special metering, and the right to access interval usage and other metering data on my account(s).
5. Request rate analysis.
6. Request rate changes.
7. Request and receive verification of balances on my account(s) and discontinuance notices.

<sup>1</sup> The Utility will provide standard customer information without charge up to two times in a 12 month period per service account. After two requests in a year, I understand I may be responsible for charges that may be incurred to process this request.

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**I (CUSTOMER) AUTHORIZE THE RELEASE OF MY ACCOUNT INFORMATION AND AUTHORIZE MY AGENT TO ACT ON MY BEHALF ON THE FOLLOWING BASIS<sup>2</sup> (initial one box only):**

<sup>2</sup>If no time period is specified, authorization will be limited to a one-time authorization

One time authorization only (limited to a one-time request for information and/or the acts and functions specified above at the time of receipt of this Authorization).

One year authorization - Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the twelve month period from the date of execution of this Authorization.

Authorization is given for the period commencing with the date of execution until \_\_\_\_\_ (Limited in duration to three years from the date of execution.) Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the authorization period specified herein.

**RELEASE OF ACCOUNT INFORMATION:**

**The Utility will provide the information requested above, to the extent available, via any one of the following. My (Agent) preferred format is (check all that apply):**

- Hard copy via US Mail (if applicable). N/A
- Facsimile at this telephone number: \_\_\_\_\_ N/A
- Electronic format via electronic mail (if applicable) to this e-mail address: BBPINFO@XOOMENERGY.COM

I (Customer), \_\_\_\_\_ (print name of authorized signatory), declare under penalty of perjury under the laws of the State of California that I am authorized to execute this document on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I further certify that my Agent has authority to act on my behalf and request the release of information for the accounts listed on this form and perform the specific acts and functions listed above. I understand the Utility reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. I authorize the Utility to release the requested information on my account or facilities to the above Agent who is acting on my behalf regarding the matters listed above. I hereby release, hold harmless, and indemnify the Utility from any liability, claims, demands, causes of action, damages, or expenses resulting from: 1) any release of information to my Agent pursuant to this Authorization; 2) the unauthorized use of this information by my Agent; and 3) from any actions taken by my Agent pursuant to this Authorization, including rate changes. I understand that I may cancel this authorization at any time by submitting a written request. **[This form must be signed by someone who has authority to financially bind the customer (for example, CFO of a company or City Manager of a municipality).]**

\_\_\_\_\_  
AUTHORIZED CUSTOMER SIGNATURE

\_\_\_\_\_  
TELEPHONE NUMBER

**Executed this** \_\_\_\_\_ **day of** \_\_\_\_\_ **at** \_\_\_\_\_  
MONTH YEAR CITY AND STATE WHERE EXECUTED

I (Agent), hereby release, hold harmless, and indemnify the Utility from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this authorization and from the taking of any action pursuant to this authorization, including rate changes.

**704.274.1450**

\_\_\_\_\_  
AGENT SIGNATURE

\_\_\_\_\_  
TELEPHONE NUMBER

**XOOM Energy - California, LLC ("XOOM Energy")**

\_\_\_\_\_  
COMPANY

**Executed this** \_\_\_\_\_ **day of** \_\_\_\_\_  
MONTH YEAR



