



# RESIDENTIAL HEAT PUMP WATER HEATER INCOME ELIGIBLE REBATE

## Steps to Getting Your Rebate

- Review program requirements below. Burlington Electric Department customers are not eligible for this rebate.
- Confirm your heat pump water heater is on the qualifying product list at [efficiencyvermont.com/HPWH](http://efficiencyvermont.com/HPWH); if it is not on the list, it is not eligible for the rebate.
- Complete and sign this application.
- Submit completed application with W9 (if applicable) and invoice(s) including the quantity, size, type, manufacturer, model or part number, purchase date, and vendor. Submit Declaration of Ownership form if you are a renter.

Submit via one of the following:

**E-mail:** [rebatecoordinator@efficiencyvermont.com](mailto:rebatecoordinator@efficiencyvermont.com)

**Mail:** Efficiency Vermont  
c/o Rebate Coordinator  
20 Winooski Falls Way, 5th floor  
Winooski, VT 05404

**Fax:** 802-658-1643

## Customer Information.....

Contact Name \_\_\_\_\_

Install Address \_\_\_\_\_ City/Town \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

E-mail Address \_\_\_\_\_ Telephone # \_\_\_\_\_

Check to receive energy-saving offers and updates via email

\_\_\_\_\_

Electric Utility Company

\_\_\_\_\_

Electric Utility Account # (installation location)

Select one of the following by checking the applicable box:

I own my residence.

OR

I am a renter. (If you are a renter, you must also submit a Declaration of Ownership signed by the property owner for the water heater being replaced.)

## Rebate Payment Information .....

A W9 is required if rebate is being paid to a business. Have you submitted a W9 in the last 12 months?

Yes (you do not need to attach another copy)     No (complete and attach a W9, available at [www.irs.gov](http://www.irs.gov))

Rebate check payable to (if being paid to a business, name must match W9) \_\_\_\_\_

Contact name (if different) \_\_\_\_\_  Send check to installation address listed above -

Mailing address (if different than installation address) \_\_\_\_\_ City/Town \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Brought to you by:



# Income Verification

I hereby certify that:							Initials	
I am a residential customer and meet the household income guidelines below.								
<i>Qualifying households must meet the thresholds below. Income is defined as the combined total annual gross income of all family and non-family members living within the household; see below for more information. If your household has more than 5 members, please call 888-921-5990 to determine your eligibility.</i>								
Select the check box next to the amount that your annual gross household income falls at or below, based on the county you live in and the number of people in your household:								
		Annual household income limit by household size						
		1	2	3	4	5		
Chittenden, Franklin, Grand Isle counties	Low Income	<input type="checkbox"/> \$63,600	<input type="checkbox"/> \$72,700	<input type="checkbox"/> \$81,800	<input type="checkbox"/> \$90,850	<input type="checkbox"/> \$98,150		
	Moderate Income	<input type="checkbox"/> \$95,600	<input type="checkbox"/> \$109,200	<input type="checkbox"/> \$122,800	<input type="checkbox"/> \$136,400	<input type="checkbox"/> \$147,400		
Addison county	Low Income	<input type="checkbox"/> \$55,550	<input type="checkbox"/> \$63,450	<input type="checkbox"/> \$71,400	<input type="checkbox"/> \$79,300	<input type="checkbox"/> \$85,650		
	Moderate Income	<input type="checkbox"/> \$83,280	<input type="checkbox"/> \$95,160	<input type="checkbox"/> \$107,040	<input type="checkbox"/> \$118,920	<input type="checkbox"/> \$128,520		
All other VT counties	Low Income	<input type="checkbox"/> \$55,050	<input type="checkbox"/> \$62,900	<input type="checkbox"/> \$70,750	<input type="checkbox"/> \$78,600	<input type="checkbox"/> \$84,900		
	Moderate Income	<input type="checkbox"/> \$82,400	<input type="checkbox"/> \$94,200	<input type="checkbox"/> \$106,000	<input type="checkbox"/> \$117,800	<input type="checkbox"/> \$127,400		

# Flood Damages (Complete even if your property did not sustain flood damage)

Please initial for each statement. I hereby certify that:	Initials
<p>1. Select one of the following by checking the applicable box:</p> <p><input type="checkbox"/> My residence located at _____ (the "affected property") did not incur damages from flooding on or after July 10, 2023.</p> <p style="text-align: center;">OR</p> <p><input type="checkbox"/> My residence located at _____ (the "affected property") incurred damages from flooding on or after July 10, 2023 (or between July 10 and August 10, 2023 for residents of Addison County), and my existing water heater was not damaged by the flooding.</p> <p style="text-align: center;">OR</p> <p><input type="checkbox"/> My residence located at _____ (the "affected property") incurred damages from flooding on or after July 10, 2023 (or between July 10 and August 10, 2023 for residents of Addison County), and my existing water heater does not function properly as a result of the flood damage.</p>	

# Flood Damages, continued

Please initial for each statement. I hereby certify that:	Initials
<p>Complete 2-6 below ONLY if your residence incurred damages as a result of the flooding (7/10/23-7/31/23 or between 7/10/23-8/10/23 for residents of Addison County).</p> <p>2. Select one of the following by checking the applicable box:</p> <p><input type="checkbox"/> I have applied for and completed the Federal Emergency Management Agency (FEMA) process for assistance (including submitting a claim to FEMA, applying for a federal Small Business Administration loan, and pursuing all available appeals) to ensure I receive the full FEMA benefits I am entitled to. Any questions regarding this process should be directed to 1(800)621-3362.</p> <p style="text-align: center;">OR</p> <p><input type="checkbox"/> I am eligible for FEMA but have not applied for it.</p> <p style="text-align: center;">OR</p> <p><input type="checkbox"/> I am ineligible for FEMA assistance because my affected property is not located in FEMA Individual Assistance declared county.</p>	
<p>3. I understand that if I am eligible for FEMA assistance and have not completed the full FEMA process as articulated above, by accepting an Efficiency Vermont rebate I may forfeit or limit my ability to receive assistance from FEMA.</p>	
<p>4. I will use any Home Repair award that I receive from FEMA only on home repair expenses.</p>	
<p>5. I will use any Personal Property award that I receive from FEMA only on personal property expenses.</p>	
<p>6. The Efficiency Vermont incentive(s) for which I am applying are not duplicative to other funds that my household has received, including (1) funds from insurers for the items or repairs for which I am requesting the Efficiency Vermont incentive(s), and (2) funds from state and federal flood-relief programs that I have applied, or will apply, to the costs of the items or repairs for which I am requesting the Efficiency Vermont incentive(s).</p>	

## Product information

See [efficiencyvermont.com/HPWH](https://efficiencyvermont.com/HPWH) for rebate details.  
 If you do not meet the income requirements, you could still receive a \$600 rebate.

Rebate Level	
Income Level	Incentive
Low income	100% of costs
Moderate income	90% of costs

Water Heater Information				
Replaced Water Heater Fuel Type	Manufacturer	Model #	Purchase Date	Total Cost (include installation, taxes, etc.)
<input type="checkbox"/> Oil <input type="checkbox"/> Electric <input type="checkbox"/> Propane <input type="checkbox"/> Natural Gas				

## Program Eligibility and Exclusions

Offer is for residential customers of VT electric utilities (with the exception of Burlington Electric Department), and is subject to change without notice. Rebate can be combined with other Efficiency Vermont offers (including point of purchase discounts).

Rebate must be submitted on or after the program/offer "effective date" of 4/1/2024 and within 365 days of the product purchase date. Rebate subject to availability of funds. In the event this rebate is discontinued or changed, submissions will be processed at the new rebate level as of the date of the change, or will not be accepted if the funds are exhausted.

All equipment must be new, installed in Vermont, and listed on the Qualifying Products List (or meet Efficiency Vermont qualifying criteria) at the time of purchase. Used, rebuilt, or refurbished equipment is not eligible. For residential customers only.

For any single item, payment will not exceed the net price to the customer. Net price includes price of the item, shipping, sales tax, installation cost, and disposal/recycling expenses, and must be reduced by any benefits and payments received from insurance, FEMA, and any other donations, Efficiency Vermont programs, or grants.

Customer is responsible for any tax liability associated with rebate payment. Allow 60 calendar days for delivery of payment. Incomplete or missing information will delay processing.

### Income Eligibility for Residential Households

Residential customers are eligible to receive this benefit if their household income is at or below the income guidelines. Income is defined as the total annual gross income of all family and non-family members age 18 and over living within the household. To calculate income, take the monthly amount from the last one or two paychecks for yourself and the people in your household (before taxes) and multiply by 12. Include all wages, including regular salaries and overtime. If you are self-employed, use the previous month of pretax income and multiply by 12.

All sources of income must be counted from all persons in the household based on anticipated income expected within the next 12 months. Possible types of income include but are not limited to: wages, salary, tips, bonuses or commissions payments, public assistance, social security/SSI, child support, regular gifts, unemployment, income earned on assets (savings, IRA, etc.) and some types of financial aid.

## Customer Agreement: [sign below](#)

*By signing below, I certify that:*

*The information that I have presented in this form is true, complete and accurate to the best of my knowledge and belief.*

*I understand the potential consequences, including the recapture of this benefit, as well as civil or criminal liability, of providing false statements or information in order to secure this benefit from the State.*

*I understand that Efficiency Vermont (or their designated contractor) reserves the right to conduct field inspections and may use my information submitted in this form to do so.*

*I meet the eligibility requirements listed above and I agree to the program terms and conditions. For full terms and conditions, see [efficiencyvermont.com/terms](http://efficiencyvermont.com/terms).*

*I understand that my self-certification of income, damages, and non-duplication of funding may be subject to further verification by Efficiency Vermont. If requested, I will provide the information required to verify this data. I, therefore, authorize such verification, and I will provide supporting documents, if requested.*

*In the event that Efficiency Vermont or the State of Vermont, in their sole discretion, determines that some or all of this benefit is duplicative to other benefit I have received, I agree to repay Efficiency Vermont or the State, as directed, the duplicative amount in question.*

*I understand and agree that Efficiency Vermont may receive information from FEMA verifying my application(s) for FEMA and SBA funding, the content and status of such applications, FEMA and SBA determinations and actions related to the applications, the funding provided to me by FEMA and SBA, and any other information that may be relevant to my application for the Efficiency Vermont incentive(s).*

*I agree to comply with all other applicable Federal and state laws and regulations concerning this benefit as well as any applicable insurance and mortgage policy requirements. I am responsible for consulting any tax, legal, insurance, or mortgage professionals I decide are necessary to ensure compliance with these requirements.*

Customer Signature

Date

To learn more, call **888-921-5990**  
or visit [efficiencyvermont.com](http://efficiencyvermont.com)

