

# INCOME VERIFICATION



Indicate your household size and income below to determine eligibility for enhanced Home Performance with ENERGY STAR® incentives.

## Steps to Getting an Enhanced Incentive

- Hire an Efficiency Excellence Network (EEN) contractor.
- Determine eligibility (see below).
- Work with EEN contractor to complete project.
- Submit this form to Opportunities Credit Union with supporting documents.

**Online:** oppsvt.org/income

**E-mail:** income@oppsvt.org

**Mail:** Opportunities Credit Union  
PO Box 67  
Attn: Income Verification  
Winooski VT 05404

**Fax:** 802-654-4551

## Applicant Information .....

Contact name	Email <input type="checkbox"/> Get energy-saving offers and tips from Efficiency Vermont		
Phone Number	Electric Utility Company		
Project / Physical Address	City	State	Zip Code
Mailing Address (if different)	City	State	Zip Code
Contractor Name (if known)	Business Name		

## Household Income .....

Income is defined as the total gross income of all family and non-family members age 18 years and older living within the household. Opportunities Credit Union will determine annual household income for all members of the household. 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. See page 2 for eligibility details including acceptable forms of documentation.

Number of people in household	County of residence	Household income
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## Applicant Agreement .....

*By submitting this form, I hereby certify that I am the applicant listed on this form, and that the information I have provided on this form, and the supporting documents, is accurate and complete. I understand that this may be subject to further verification. If necessary, I will provide the information required to verify this data. I, therefore, authorize such verification, and agree to the terms and conditions. See full terms and conditions at [efficiencyvermont.com/terms](http://efficiencyvermont.com/terms).*

Number of people in household	Annual household income limit by county		
	Chittenden, Franklin, Grand Isle	Addison	All other VT counties
1	\$95,600	\$83,280	\$82,400
2	\$109,200	\$95,160	\$94,200
3	\$122,800	\$107,040	\$106,000
4	\$136,400	\$118,920	\$117,800
5	\$147,400	\$128,520	\$127,400
6	\$161,120	\$138,000	\$140,800
7	\$181,680	\$147,480	\$146,200
8	\$202,240	\$157,080	\$155,600

## Eligibility & Exclusions

Offer is for residential customers of VT electric utilities, and is subject to change without notice. You may be eligible to receive a higher rebate if your income is at or below the income guidelines listed above. Allow 60 calendar days for delivery of payment (from final project data submission). Incomplete or missing information will delay processing.

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For each household member, the credit union will collect the person's name, all sources of income (including earned and unearned income), total annual income, and required supporting documentation. Acceptable forms of income documentation include:

- o Most recent Social Security benefits statement (if Social Security, Social Security Disability Insurance, or Supplemental Security Income was received)
- o First two pages of most recent federal income tax return (if income tax return was filed)
- o Unemployment Benefits Statement from the past 12 months (if unemployment benefits were received)
- o Current paystubs with year-to-date wages listed
- o The most recent IRS Schedule C and the following information for each source of self-employment income: type of business, time period, gross income, expenses, depreciation, and net income
- o If the household member received another type of income, a document or documents that confirm the income

Opportunities Credit Union will provide Efficiency Vermont with the results of the income verification which Efficiency Vermont will use to determine eligibility for the enhanced incentives. Specific income details provided to Opportunities Credit Union will not be shared with Efficiency Vermont.

For Home Performance with ENERGY STAR program requirements, visit [efficiencyvermont.com/HP](http://efficiencyvermont.com/HP).