



## CUSTOMER PROFILE RATE REQUEST FORM

\*Consultant Name:  
 \*Date /Time Submitted:  
 \*Close Meeting – Date/Time:

|                            |                              |
|----------------------------|------------------------------|
| <b>COMPANY INFORMATION</b> | <b>NOTE * REQUIRED FIELD</b> |
|----------------------------|------------------------------|

|                       |        |           |                         |
|-----------------------|--------|-----------|-------------------------|
| Legal Entity<br>*Name |        | *DBA Name |                         |
| Street<br>*Address    |        |           | Unit #                  |
| *City                 | *State | *ZIP      |                         |
| *Phone                | Fax    |           |                         |
| *Contact Full Name    |        |           | *Authorized Signer Name |
| *Email                |        |           | Website                 |
| Tax ID #              |        |           | Duns #                  |

|                             |  |  |  |
|-----------------------------|--|--|--|
| <b>RATE REQUEST DETAILS</b> |  |  |  |
|-----------------------------|--|--|--|

|                         |  |                         |  |           |  |
|-------------------------|--|-------------------------|--|-----------|--|
| *Under Contract? Y/N    |  | Start Date              |  | Exp. Date |  |
| *Competitive Bid? Y/N   |  |                         |  |           |  |
| *Desired Term Months    |  | *New Service Start Date |  |           |  |
| *Desired Agreement Type |  |                         |  |           |  |
| Additional Approval Y/N |  | Name                    |  |           |  |

|                                  |
|----------------------------------|
| <b>SPECIAL INSTRUCTION NOTES</b> |
|----------------------------------|

|                                      |
|--------------------------------------|
| <b>RATE REQUEST PROCESSING STEPS</b> |
|--------------------------------------|

1. Complete this form and all of the required fields (Use this form when meeting with the customer to get all the required info for portal)
2. InSource Power Consultants must enter the opportunity (Rate Request) into the portal by going to [www.insourcepower.com/crm](http://www.insourcepower.com/crm)
3. You may upload the energy bill(s) to the opportunity in the portal or fax the full bill to InSource Power Inc via fax to 212.208.2918.
4. If all of the information provided on the rate request form is not complete our pricing desk cannot process the client to our providers.

**E-mail Rate Request To: [pricing@insourcepower.com](mailto:pricing@insourcepower.com) Fax: 212-208-2918**