



CUSTOMER PROFILE RATE REQUEST FORM

<p>*Consultant Name:</p> <p>*Date /Time Submitted:</p> <p>*Close Meeting – Date/Time:</p>

COMPANY INFORMATION	NOTE * REQUIRED FIELD
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Legal Entity *Name		*DBA Name	
Street *Address			Unit #
*City	*State	*ZIP	
*Phone	Fax		
*Contact Full Name			*Authorized Signer Name
*Email			Website
Tax ID #			Duns #

RATE REQUEST DETAILS

*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			

SPECIAL INSTRUCTION NOTES

RATE REQUEST PROCESSING STEPS

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
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 Fax: 212-208-2918
