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Energy Choice Solutions dba EnergyWize

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Addison, TX 75001

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www.myenergywize.com

New Hampshire Public Utilities Commission
Debra Howland, Executive Director
21 South Fruit Street, Suite 10
Concord, NH 03301-2429

RE: Docket DM 14-084

Dear Ms. Howland:

Attached please find a completed aggregator application for EnergyWize, which replaces in its entirety the application filed on March 28, 2014. Please note our primary business model is that of an energy broker for businesses, but we may also be considered an aggregator as defined in New Hampshire Public Utilities Commission rules. As such, we are respectfully submitting the attached application to become an electric aggregator in New Hampshire. Please also note that through our partnership with ista, we are pursuing broker EDI services offered by utility companies in New Hampshire (for purposes of electronically obtaining historical meter data) and these efforts will commence upon approval of our aggregator application.

Please let us know if you have any further questions and thank you for your consideration.

Sincerely,

Energy Choice Solutions LLC
dba EnergyWize

Puc 2006.02

Form for Initial and Renewal Registration of Aggregators

- (1) **The legal name of the applicant as well as any trade name(s) under which it intends to operate in this state**

Legal Name: Energy Choice Solutions LLC

Trade Name: EnergyWize

- (2) **The applicant's business address, telephone number, e-mail address and website address, as applicable**

15455 Dallas Parkway

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- (3) **The name(s), title(s), business address(es), telephone number(s), and e-mail address(es) of the applicant if an individual or of the applicant's principal(s), if the applicant is anything other than an individual**

Doug Brennecke, Managing Member

15455 Dallas Parkway

Suite 1400

Addison, TX 75001

dbrennecke@myenergywize.com

(469) 708-4203

- (4) **The telephone number of the customer service department or the name, title, telephone number and e-mail address of the customer service contact person of the applicant, including toll free telephone numbers if available**

Miles Higgins, Partner

15455 Dallas Parkway

Suite 1400

Addison, TX 75001

mhiggins@myenergywize.com

(469) 708-4205

(855) 581-9493

- (5) **A copy of the applicant's authorization to do business in New Hampshire from the secretary of state, if anything other than an individual**

See attached certificate

(6) Description of the geographic areas of New Hampshire in which the applicant intends to provide service, consistent with Puc 2006.01(a)(10)

EnergyWize intends to provide energy broker services to businesses located in the following utility areas in New Hampshire:

- Liberty Utilities (Granite State Electric Co.)
- New Hampshire Electric
- Public Service of New Hampshire
- Unitil Power Corporation (Concord Electric Company)

(7) A statement that the applicant is not representing any supplier interest or a listing of any supplier interest the applicant intends to represent

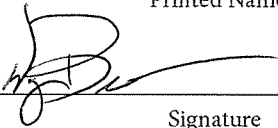
By the signature in section 9 below, EnergyWize attests that is not affiliated with any supplier. However, EnergyWize does have contractual relationships with Constellation and Direct Energy as detailed in the attached documentation and may enter into similar contracts with other New Hampshire licensed energy suppliers in the future.

(8) Except as provided in 2003.04(e), payment of the required filing fee

Check for \$250 filing fee enclosed.

(9) The signature of the applicant or its representative

Doug Brennecke, Managing Member
Printed Name


Signature

4/1/2014
Date

State of New Hampshire Department of State

CERTIFICATE OF REGISTERED TRADE NAME

OF

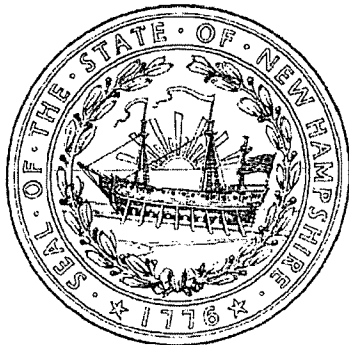
EnergyWize

This is to certify that Energy Choice Solutions LLC registered in this office as doing business under the Trade Name EnergyWize, at 15455 Dallas Parkway Suite 1400 Addison, TX 75001 on March 10, 2014.

The nature of business is EnergyWize is a broker of electricity and natural gas services in markets where customers have a choice of energy providers.

Expiration Date: March 10, 2019

Business ID#: 705314



IN TESTIMONY WHEREOF, I hereto
set my hand and cause to be affixed
the Seal of the State of New Hampshire,
this 10th day of March, 2014 A.D.

A handwritten signature in cursive script, appearing to read "William M. Gardner".

William M. Gardner
Secretary of State

COMPANY PROFILE

INTRODUCTION

EnergyWize, an energy broker that holds contracts with leading retail electricity and natural gas suppliers, provides web-based sales productivity services making it easier for sales agents to source and sell electricity and natural gas services to businesses. The company's vision is to fundamentally change how sales agents sell energy services to businesses. Through technology that addresses many of the traditional energy sales process inefficiencies, EnergyWize creates an efficient market to help its agents assist business customers in selecting the best energy supplier. Initially, the focus of the EnergyWize services portfolio is on energy procurement for electricity and natural gas services but over time the company expects to offer additional value-add services to the market including data analytics, energy management, and demand response.

EnergyWize helps its sales agents minimize busy work and optimize sales results through side-by-side comparison of price quotes from leading energy suppliers, automated retrieval of historical usage information from utilities, easy comparison of energy suppliers to quickly identify the best product for a customer, automated generation of personalized electronic proposals, automated generation of energy contracts with electronic signature technology (DocuSign), and electronic management of all customer information.

BENEFITS

Through its unique web-based energy procurement system, EnergyWize creates benefits for all parties involved in the sales process:

- **Customers** – businesses traditionally have only been able to select an energy supplier based on the limited energy supplier relationships that a broker may have in the market. With EnergyWize, customers have access to all leading energy suppliers in the market resulting in more options and in many cases lower rates. In addition, an easier to understand and streamlined sales process serves to minimize customer confusion and improve customer satisfaction with purchasing energy services. Having more buying options, lower rates, and a higher level of service helps realize the benefits of energy competition as envisioned by regulators.
- **REPs/ESCOs** – energy suppliers uniquely benefit from working with EnergyWize in several ways. First, many of the traditional sales support functions are eliminated by automation through the energy procurement system which in turn reduces operational costs for energy suppliers and enables suppliers to offer more competitive pricing to customers. Second, EnergyWize enables suppliers to tap into new sales channels by virtue of the EnergyWize software making it easier for brokers to understand energy and profitably offer energy services to their customers. Finally, EnergyWize provides real-time win/loss reporting to suppliers helping to pinpoint the exact reasons as to why a supplier may not have won an opportunity. Armed with this information, suppliers can adjust pricing and programs to optimize sales results consistent with their company strategies. Never before has such statistically valid data been available to suppliers and this information further serves to help customers benefit from the lowest possible energy pricing.
- **Agents** – the traditional energy sales process is manual and inefficient. Agents must contact suppliers through phone/email/fax to get energy quotes, manually generate energy proposals, manage paper-based energy contracts, and make many calls throughout the sales process to get updates from suppliers. Even the “broker portals” offered by many REPs/ESCOs require agents to learn many different software programs and enter the same customer information into multiple systems to get energy quotes. With the web-based EnergyWize energy procurement system, agents enter customer information one time and electronically manage all facets

of the energy sales process through automated energy pricing quotes from leading suppliers, automated generation of energy proposals, execution of energy contracts with eSignature (DocuSign), and automated electronic communications with energy suppliers throughout the sales process. Further, the software is optimized for mobile devices so that agents can offer service to customers where and when they need it. The result of these process improvements is that the agent reduces sales costs and can spend less time managing busy work and more time helping customers identify and select the best energy supplier for their business needs. In addition, all customer information, documentation, and communications is securely and electronically managed.

AGENT TRAINING & CERTIFICATION

Another key component of the EnergyWize strategy is to properly train and manage sales agents to ensure compliance with state regulations and improve the level of service provided to customers. EnergyWize has developed its own web-based training system whereby EVERY sales agent must complete a series of online courses that cover selling energy services and compliance with state regulations. Courses are unique to each state and to each commodity within each state (i.e. electricity and gas). Each course includes a test that must be passed before an agent is certified to sell electricity or gas services in a specific state.

COMPANY HISTORY

EnergyWize was formed in August 2012 as a Texas Limited Liability Company. The company was founded by InSite Services and MDW Energy Partners. InSite Services is a leading provider of cloud software services (SaaS) that help organizations transform business processes. InSite's web-based technology solutions enable companies to improve results and create competitive advantages through cost reduction, improved information management, and streamlined business processes. MDW Energy Partners is an energy broker firm headquartered in Texas providing a range of energy procurement and energy management services to businesses.

While EnergyWize was officially formed in August 2012, the services offered by the company have roots back to 2006. InSite Services (co-founder of EnergyWize), has been developing and managing commercial market sales and order management software applications for Retail Electricity Providers (REPs) and Energy Service Companies (ESCOs) across the country since 2006. In fact, over \$5 million dollars has been invested in these energy sales process software applications over the past 8 years. The energy procurement system utilized by EnergyWize leverages a large amount of these investments and therefore the services offered by EnergyWize are not based on untested technology. MDW Energy Partners has been providing energy procurement and energy management services to businesses since 2010.

Through providing commercial sales and order management software to REPs/ESCOs and energy broker services to businesses, the founders of EnergyWize identified the need for a whole new way of delivering energy services to the business market through brokers. While REPs/ESCOs have been investing in "broker portals" to replace traditional manual sales processes, these portals are more designed to benefit REPs/ESCOs than the brokers who use the portals in providing service to customers. And since brokers represent about 65% of energy sales to the business market, providing true value to brokers is a critical element to improving the level of service provided to customers in realizing the objectives of energy market deregulation.

After 30 months of developing and configuring the core technology for EnergyWize use, the company launched a beta program in August 2013 with 7 agents in Texas. The beta program was extremely successful and no issues or challenges were identified. As a result, the decision was made to officially launch the system in November 2013. Since that time, EnergyWize has added nearly 50 new agents in Texas and the company expects to have 200 total agents by the end of 2014. In addition, demand for expansion to additional states has been higher than originally expected

forcing EnergyWize to accelerate its expansion plans. The current target is to enter an additional 10 states beyond Texas before the end of 2014.

BUSINESS AFFILIATIONS

- **TEPA** – EnergyWize is a member of The Energy Professionals Association (TEPA). TEPA was established in April 2005 to promote a standardized code of conduct among members, educate the community on energy initiatives and advocate legislative plans for the deregulated energy market. A 501 (c)(6) organization composed of Aggregators, Brokers, and Consultants (A/B/Cs), Retail Energy Providers (REPs) and affiliate members, TEPA specializes in providing market knowledge to help consumers make the best energy procurement choices and to uphold the integrity of deregulated retail energy markets across the country. For more information visit www.tepausa.org.
- **ista** – EnergyWize has a strategic partnership with ista North America (www.ista-na.com), a leading provider of billing, customer management, hosted EDI and on-demand information exchange services for energy companies. Automating traditional energy sales processes is a fundamental strategy of EnergyWize and one component is management of historical energy usage information. The process of requesting historical usage information is almost always a manual process by energy brokers and as a result a very time-intensive activity including the generation of Letters of Authorization (LOAs), sending historical usage requests to utility companies, and then sending historical usage files to REPs/ESCOs for energy price quotes. EnergyWize has automated this entire process from DocuSign-enabled LOAs to automated delivery of historical usage information to REPs/ESCOs. A key element of this automated process is an Electronic Data Interchange (EDI) transaction to obtain historical data from utility companies. As an EnergyWize strategic partner, ista is certifying EnergyWize as an EDI broker in all utility areas and in all states that offer this EDI option (currently over 50 utility companies). To the best of its knowledge, EnergyWize will be the first energy broker in the country to automate the historical usage data process via EDI across multiple states. This investment streamlines the sales process to improve customer satisfaction, reduce errors and rework, and removes costs for all parties involved.

Upon approval of this broker license application, EnergyWize plans to immediately begin work on becoming a certified EDI broker with the New Hampshire utility companies that offer broker EDI services as state aggregator license approval is required before broker EDI certification can begin with utility companies. All New Hampshire utilities offering broker EDI services have an “ad hoc” request testing policy and therefore EnergyWize will request EDI testing interface dates as soon as aggregator license application approval is received. EDI interface testing is expected to occur in the May timeframe so that EnergyWize can achieve its target New Hampshire launch date of 8/15/14.

EXPERIENCE OF COMPANY & KEY PERSONNEL

Collectively, the EnergyWize management team has over 50 years of experience in deregulated energy markets. This experience includes different industry perspectives including REP/ESCO executive management, energy brokerage, and energy software systems. EnergyWize leverages this broad industry experience to provide a unique energy procurement service that serves to redefine how energy services are sold to the business market.

Key EnergyWize personnel includes the following professionals:

DOUG BRENNECKE

Doug has 27 years of business experience helping businesses improve business performance through technology and business process automation in the financial and energy sectors. For the past 8 years, as Vice-President of Technology and Client Services for InSite Services, Doug has been designing, developing, implementing, and managing commercial market sales and order management software applications for Retail Electricity Providers (REPs) and Energy Service Companies (ESCOs) across the country. Through his work with InSite clients such as Direct Energy and Constellation, Doug has acquired in-depth knowledge on how the commercial market energy sales process operates from managing prospect information all the way through billing system enrollment. Doug's energy market software solutions redefined many of the traditional and inefficient sales processes associated with managing brokers, managing historical usage requests, generating price quotes, generating energy proposals, generating energy contracts, performing automated credit checks, processing energy contracts, managing sales commissions, and integration with energy billing systems.

Prior to working in the energy sector, Doug served as Director of Sales for Imagine Solutions, VP of Sales for CompuThink, Channel Manager at SER Solutions, Director of Product Marketing at BancTec, Workflow and Document Management Consultant at IBM Global Services, and a Senior Software Engineer at E-Systems. Doug has developed and sold tens of millions of dollars of document management software solutions to a range of Fortune 1000 companies and is an accomplished speaker at industry events and conferences.

Doug has a B.S. degree in engineering from Tulane University.

MILES HIGGINS

Miles Higgins has over 28 years of diversified operational, marketing and financial experience with expertise in strategic planning and business operations management. For the past 15 years, Miles has specialized in the restructured utility sector with an emphasis on the deregulated retail segment.

Most recently, Miles was President and Founder of SageMark LLC, a business consulting firm providing business strategy services to retail energy organizations across the United States. Client engagements included a full strategic analysis for one of the largest ESCOs in the northeast along with the implementation of a business process automation system to streamline operations, assisting a large retail energy provider with their entry into the Texas retail electric market, developing a prepaid program for one of the largest REPs in Texas, active involvement with smart meter regulatory proceedings in Texas, and representing a major industry marketing association at Texas PUC meetings.

Prior to SageMark, Miles co-founded two highly successful deregulated retail energy providers in Texas including StarTex Power and GEXA Energy. As Senior Vice President Strategic Development and Operations at StarTex Power, Miles established the framework to support a competitive retail electric provider in the Texas deregulated utility market, managed business operations, developed strategic direction and implemented new products and technology,

and managed strategic business partnerships for business growth. As Vice President for GEXA Energy, Miles managed the day-to-day back office support, supported the network infrastructure including data transfer/storage requirements and the billing system, and established processes for managing daily billing and payment processing.

Miles also served as Director of Account Management for ExoLink Corporation, a premier provider of retail energy business process integration services, where he assisted clients in meeting the challenges of testing and entering deregulated utility markets across multiple states including Texas, Michigan, New York, Ohio and Pennsylvania.

Miles has a Bachelor of Business Administration degree in Finance from Texas State University.

DALE STEWART

Dale Stewart, co-founder of CSG Affiliates, has more than 30 years of experience in the telecommunications and energy industries. From CSG Affiliates inception in 2002, Dale was responsible for establishing and directing all day-to-day operations of this \$25 million company. Today, CSG Affiliates is a recognized leader in the master agent/broker marketplace and among the largest master agents in Texas, supporting over 50 companies and individuals in their enterprise sales initiatives.

A recognized leader in the telecommunications industry, Dale utilized his agent relationships and supplier management expertise to broaden the CSG Affiliates portfolio to include energy procurement services. CSG initially began providing energy services as a broker in 2005 in the state of Texas and over the past several years, energy broker revenues have grown tremendously for CSG. Dale is also a co-founder and board member of InSite Services and a principal owner of MDW Energy Partners.

Prior to starting CSG Affiliates, Dale was Vice President of Sales for Cable and Wireless, a major Global player in the Telecom marketplace. During his tenure, Cable and Wireless USA revenues grew from \$400 million to well over \$1 billion dollars. Dale also worked at other major telecom providers, such as Sprint and GTE in sales, sales management, and executive positions.

Dale graduated from the Tampa College, out of Florida, with a Bachelor of Business Administration and Marketing.

WES MATTHEWS

Wes has 25 years of business and sales experience in the telecommunications and energy industries with a focus on recruiting, managing, and supporting sales agents. As the key principal of MDW Energy Partners, Wes has been helping Texas businesses optimize energy procurement decisions since 2010. Wes is also a co-founder and board member of both CSG Affiliates and InSite Services.

Wes is a recognized industry leader in helping telecommunications sales agents expand their services to include energy procurement. Utilizing his knowledge of the similarities between the telecommunications and energy markets, Wes has developed energy procurement content and programs for telecommunications sales agents in deregulated states across the country. In 2013, Wes successfully recruited the second largest telecommunications master agent in U.S. to become an EnergyWize partner and under this partnership, EnergyWize expects to have hundreds of new certified sales agents selling electricity and gas services to thousands of businesses across the country. As part of these national sales agent partnerships, Wes is also playing a key role in EnergyWize's expansion to deregulated energy markets across the country.

Prior to starting CSG Affiliates and MDW Energy Partners, Wes served as Director of Sales at Cable and Wireless and Global Crossing as well as Managing Director at Universal Access in the telecommunications market.

Wes has a B.S. degree in business from Stephen F. Austin State University.

MARCIE ZLOTNIK

Marcie Zlotnik, co-founder of StarTex Power, has more than 10 years of experience in the energy industry. From StarTex Power's inception in 2004, Marcie was Chief Operating Officer responsible for establishing and directing all day-to-day operations of this \$500 million company. In addition, she focused her attention on the company's legislative and regulatory affairs, and was invited to testify before the Texas House and Senate committees overseeing retail electricity markets. Prior to co-founding StarTex in 2004, Marcie served as President of Gexa Energy, a Retail Electric Provider she co-founded in 2001.

A recognized and respected leader in the industry, Marcie is the proud recipient of many professional and community awards including the 2008-2010 Ernst and Young Entrepreneur of the Year Finalist, the Texas Women's Chamber of Commerce's 1996 Texas Business Woman of the Year, and the 1995 Houston Area Women's Center Volunteer of the Year. Most recently, Houston Woman Magazine recognized Marcie as one of Houston's "Most Influential Women of 2010," and she was named among the "Top 100 Professionals in Houston" by H Magazine. In addition, StarTex Power has received national and regional awards for its success. It was ranked #1 in 2009, and #3 from 2010 to 2012, in JD Power's annual customer satisfaction study of retail electric providers in Texas. StarTex Power was also ranked as the 30th fastest-growing, privately-held company in the U.S. in 2009 by Inc. 500. Marcie is especially proud to have led the company to earn recognition as "Best Company to Work for in Texas" in 2010 by Texas Monthly Magazine, and to have garnered top placements in "Best Place to Work" by Houston Business Journal for four consecutive years.

Marcie is on the Executive Board of the Gulf Coast Power Association (GCPA) and served on the Board of the Electric Reliability Council of Texas (ERCOT) in 2010 and 2011. Additionally, she served on the Board of Texas Energy Association for Marketers (TEAM), a Texas non-profit group whose purpose is to promote deregulated policies and initiatives on behalf of its members. In 2009, Marcie was appointed to serve on Houston Mayor Bill White's Task Force on Electric Reliability.

Marcie graduated from the University of Texas at Austin with a Bachelor of Business Administration in Accounting and is a licensed Certified Public Accountant.

PROJECTED FRANCHISE AREAS

Stemming from its successful launch in Texas, EnergyWize is now actively expanding its footprint to additional states with active energy market competition. The company's expansion plans involve activities associated with five (5) primary components including:

- **State Business Certificates** – certificate to conduct business in a state
- **Broker Licenses** – license to conduct business as an energy broker
- **Broker EDI Certification** – certification to conduct business electronically with utility companies for the purposes of obtaining historical usage information (only available in select utility areas in certain states). Note that EnergyWize does not need to have EDI connectivity but this is highly desired and therefore impacts the state rollout prioritization.
- **Supplier Contracts** – energy broker contracts with suppliers to sell electricity and natural gas services where available
- **Energy Procurement System Development** – development of the EnergyWize energy procurement system to process electricity and natural gas opportunities based on the differences in each state

EnergyWize is currently focusing in expansion into 12 additional states beyond Texas. The current target launch date in the state of New Hampshire is 8/15/14. The chart below summarizes the status of expansion activities for the components described above in terms of the completion or expected completion date (future dates):

	Services	State Certificate	Broker License	Broker EDI Certification	Current Supplier Contracts	Energy Procurement System	Target Launch Date
CA	Gas	3/28/14	Not Required	Not Available	4	8/30/14	TBD
CT	Electric Gas	3/28/14	4/30/14	5/30/14	4	7/1/14	8/15/14
DC	Electric Gas	2/20/14	4/30/14	6/30/14	4	7/1/14	8/15/14
IL	Electric Gas	3/28/14	4/30/14	Not Available	7	8/30/14	TBD
MA	Electric Gas	3/28/14	4/30/14	6/30/14	5	5/30/14	7/1/14
MD	Electric Gas	3/28/14	4/30/14	6/30/14	5	5/30/14	7/1/14
NH	Electric	3/10/14	4/30/14	5/30/14	2	5/30/14	8/15/14
NJ	Electric Gas	2/20/14	3/28/14	5/30/14	6	5/30/14	7/1/14
NY	Electric Gas	3/28/14	Not Required	Not Available	7	8/30/14	TBD
OH	Electric Gas	2/25/14	4/30/14	6/30/14	6	5/30/14	7/1/14
PA	Electric Gas	3/28/14	4/30/14	6/30/14	6	5/30/14	7/1/14
RI	Electric Gas	3/28/14	4/30/14	5/30/14	3	7/1/14	8/15/14
TX	Electric	8/27/12	Not Required	Not Available	7	8/1/13	11/1/13

ELECTRIC POWER & GAS SUPPLIERS

As indicated in the chart that appears on the previous page, EnergyWize currently has two (2) energy supplier contracts in place for New Hampshire including:

- Constellation Energy (electric only)
- Direct Energy (electric only)

EnergyWize is currently in the process of expanding the supplier list above to include additional providers offering service in New Hampshire. EnergyWize's supplier strategy in all states is to maintain broker agreements with only leading national and regional suppliers --- and EnergyWize never intends to have agreements with all suppliers available in a market. Leading providers are defined as suppliers that are financially stable, have solid customer ratings as detailed in the latest industry research studies (e.g. DNV GL research), offer competitive energy rates, and offer competitive broker compensation plans.