

## North Central Heat Pump Rebate and Grant Application

Thank you for your interest in NeighborImpact's Heat Pump Rebate and Grant Program! To qualify for this program, heat pumps must meet several minimum requirements, which can be found at [www.neighborimpact.org](http://www.neighborimpact.org)

**In addition to a completed application, we will need copies of the following documents:**

### **Grant Applicant Supplemental Documents**

#### **Checklist:**

- ☐ A copy of your electric bill (a household member must be bill payer)
- ☐ A copy of the estimate (bid) for heat pump installation from a qualified, CCB-accredited contractor.
- ☐ A completed Contractor Acknowledgement Form, signed by the contractor you intend to use. Form included in the application.
- ☐ A copy of the contractor's W9 tax form, signed in the current year.

### **Rebate Applicant Supplemental Documents**

#### **Checklist:**

- ☐ A copy of your electric bill (a household member must be bill payer)
- ☐ Invoice from the contractor for the repair/ installation (NOTE- must be a CCB-accredited contractor, install on or after 12/15/2025).
- ☐ Proof of payment of the installation: receipt, copy of check, credit card documentation.
- ☐ A completed W9 form for the intended recipient of the rebate (applicant). A blank W9 form can be found included in this application.

**Please return your application one of the following ways:**

Mail:

NeighborImpact Heat Pump Program  
20310 Empire Ave Suite A100  
Bend OR 97703

Email: [HeatPump@NeighborImpact.org](mailto:HeatPump@NeighborImpact.org)

Fax: 541-749-4948 (please include cover letter Attn: Heat Pump Program)

You may also drop off your application at any of our office locations.

Questions? Email us at [HeatPump@NeighborImpact.org](mailto:HeatPump@NeighborImpact.org), or call 541-323-0395

## Heat Pump Rebate and Grant Application

**All sections** must be completed to be considered for the program.

**A completed application is not a guarantee of assistance.**

Applicant name: \_\_\_\_\_  
Co-applicant (if applicable): \_\_\_\_\_  
  
Physical address of the residence you are seeking assistance for:  
\_\_\_\_\_  
City/ State/ Zip: \_\_\_\_\_  
Mailing Address (if different than above): \_\_\_\_\_  
  
Phone #(s): \_\_\_\_\_ Email: \_\_\_\_\_  
  
Total number of people in household, including children: \_\_\_\_\_

Are you applying for a **rebate** for a previous heat pump installation/ repair, or a **grant** for assistance with an upcoming heat pump installation/ repair? (Check one)

- ☐ I am applying for a rebate  
☐ I am applying for a grant

Have you applied for, or do you intend to apply for, any other heat pump incentives?

- ☐ Yes

Name of incentive provider: \_\_\_\_\_

Estimated award amount: \$ \_\_\_\_\_

- ☐ No

### Residence Information

Do you own your home?

- ☐ Yes  
☐ No  
☐ Other (please describe)  
\_\_\_\_\_

Property type:

- ☐ Site built  
☐ Manufactured (park or on land)  
☐ Multi-unit  
☐ Other (please describe)  
\_\_\_\_\_

Is the address listed above your primary residence? (The residence where you spend the majority of your time)

- ☐ Yes  
☐ No (please explain)  
\_\_\_\_\_

Heating type (check all that apply):

- ☐ Electric  
☐ Natural Gas  
☐ Propane  
☐ Oil  
☐ Solar  
☐ Pellets  
☐ Wood

Name of electric company: \_\_\_\_\_

Account number: \_\_\_\_\_

Name on account: \_\_\_\_\_

## Household Information

[illegible]

## **Applicant Disclaimer**

I agree to allow use of the information collected for all NeighborImpact programs, utility providers, Oregon Department of Energy, NeighborWorks, its agents, and sub grantees for any legitimate purpose including but not limited to the purpose of deciding eligibility for any and all assistance available, for reporting associated with those programs and for reporting and monitoring associated with those programs.

I certify that the information provided in this application is true and correct. I understand that intentional or negligent misrepresentation(s) of the information contained in this application may result in civil liability and/or criminal penalties including, but not limited to, fine or imprisonment of both under the provisions of Title 18, United States Code, Section 1001, et seq. And liability for monetary damages to the Lender, its agents, successors and assigns, insurers and any other person who may suffer any loss due to reliance upon misrepresentation which I/we have made this application.

Applicant name (print): \_\_\_\_\_

Applicant signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Rebate Applicants Only**

**Prior to your heat pump installation, what was your primary heat source? (Check one)**

- ☐ Electric
- ☐ Natural Gas
- ☐ Propane
- ☐ Oil
- ☐ Solar
- ☐ Pellets
- ☐ Wood

**Prior to your heat pump installation, what was your existing heating system(s)? (Example- electric forced air, gas furnace, wood stove)**

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**Prior to your heat pump installation, what was your existing cooling system(s), if any? (Example- electric forced air, window unit, N/A)**

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**Was the address listed on this application your primary residence when the heat pump repair/ installation took place? (Where you spent the majority of your time)**

- ☐ Yes
- ☐ No (please explain)

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**Did the heat pump replace or supplement your existing heating system? Check one.**

- ☐ Replace (I only heat and/or cool with the heat pump now)
- ☐ Supplement (I use the heat pump in addition to my other heating and/or cooling system)

**Date of heat pump repair or replacement:** \_\_\_\_\_

**Describe heat pump repair or replacement work:**

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**Please include all supplemental documents listed on the first page of the application.**

**Grant Applicants Only**

**Do you currently have heat?**

- ☐ Yes
- ☐ No

**Current heating system(s) in home (Example- electric forced air, gas furnace, wood stove):**

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**Current cooling system(s) in home (Example- electric/ gas central air, window unit):**

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**Please include all supplemental documents listed on the first page of the application.**

## Contractor Acknowledgement (Grant Applicants Only)

To be reviewed and signed by grant applicant's selected contractor

### Program Information:

NeighborImpact's Heat Pump Grant Program provides partial payments for heat pump purchase and installation, to be paid directly to a qualified contractor. The purpose of this program is to increase access to heat pumps for Central Oregon households.

### Application, Approval and Payment Process:

1. Homeowner must submit a completed application to NeighborImpact. The application materials must include documents submitted by a licensed Heat Pump contractor, including:
  - ✓ Heat Pump project cost estimate or bid, which includes heat pump brand and model number to be installed, and itemized cost estimate.
  - ✓ Contractor Acknowledgment (this document), signed by the contractor who provided the bid/estimate.
  - ✓ Contractor W9 form for current year.
2. NeighborImpact will process the application and determine if the homeowner is eligible for the Heat Pump grant program.
3. If the homeowner application is approved, a project agreement will be created between the client, NeighborImpact, and the contractor, to be signed by all parties. NeighborImpact cannot guarantee any payment until the project agreement is completed and signed.
4. The heat pump work will be completed by the contractor.
5. Prior to payment of the grant funds to the contractor, the contractor must submit:
  - ✓ An invoice that outlines NeighborImpact's portion of the cost, and the homeowner's portion (according to the project agreement).
6. Once all contractor documents have been received by NeighborImpact and the homeowner certifies that the work is complete, NeighborImpact will issue the grant payment directly to the contractor. The payment amount will be based upon the maximum grant amount identified in the signed payment agreement.
7. Payment from NeighborImpact will be conditioned on the contractor receiving applicable electrical, mechanical, or structural permits, and the installation passing all final inspections conducted by the authority having jurisdiction.
8. The homeowner will be responsible for paying contractor directly for the remaining balance of the amount owed to the contractor.

Heat pumps installed must meet several requirements to qualify. Please see [www.neighborimpact.org](http://www.neighborimpact.org) for the list of requirements, a sample project agreement, and other helpful information.

### Acknowledgment

I have read the process outline above and have reviewed NeighborImpact's website including the sample project agreement and agree to participate in the Heat Pump grant program and abide by program requirements and procedures.

Contractor : \_\_\_\_\_ CCB #: \_\_\_\_\_

Contractor representative name (print): \_\_\_\_\_

Contractor representative email: \_\_\_\_\_

Contractor representative signature: \_\_\_\_\_ Date: \_\_\_\_\_

AHRI Reference # for the unit you are proposing: \_\_\_\_\_

# Request for Taxpayer Identification Number and Certification

Give Form to the  
requester. Do not  
send to the IRS.

► Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ► _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any) _____  Exemption from FATCA reporting code (if any) _____  <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
	6 City, state, and ZIP code	
	7 List account number(s) here (optional)	

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-				-	
or									
Employer identification number									
				-					

## Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ►	Date ►
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## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*