

# Forklift Lithium Battery, Electric Forklift, and Tow Tractor Incentive Application for Business Customers

2024

A Cash Incentive Energy Efficiency Program brought to you by:



## IMPORTANT INSTRUCTIONS:

**Step 1: Determine Eligibility.** See last pages of application for detailed Terms and Conditions.

**Step 2: Install Equipment.** See last pages of application for detailed Terms and Conditions.

**Step 3: Complete and Submit Application.** A completed application **and all required supporting documents** must be received by The Utility **within 90 days of receiving equipment**. Incomplete applications will cause delays in payment or denial of the application.

Email the application and supporting documentation to: [rebate@brightenergysolutions.com](mailto:rebate@brightenergysolutions.com)

OR

Mail the application and all supporting documentation to:

ALP Utilities  
316 Fillmore St  
PO Box 609  
Alexandria, MN 56308

Phone: (320) 763-6501

Please note: ALP Utilities and its supplemental power supplier, Missouri River Energy Services, are offering this Bright Energy Solutions Program. ALP Utilities and Missouri River Energy Services together will be referred to as "The Utility" throughout this document.



Please visit [www.brightenergysolutions.com](http://www.brightenergysolutions.com) for more information about the Bright Energy Solutions® Program.

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HAS THIS PROJECT BEEN PREAPPROVED?  YES  NO

**Customer Information (Please Print)**

|                      |                   |              |          |                |
|----------------------|-------------------|--------------|----------|----------------|
| Company Name         |                   | Contact Name |          | Date Submitted |
| Installation Address | City              | State        | Zip Code |                |
| Mailing Address      | City              | State        | Zip Code |                |
| Phone                | Installation Date |              |          |                |
| Email Address*       |                   |              |          |                |

\*By providing your email address, you are granting The Utility permission to send emails regarding this project and/or updates on the incentive program.

Municipal Utility Account Number

Building Use-Please Check One

Office   
  Retail   
  Convenience Store   
  Warehouse   
  Restaurant   
  Lodging   
  Manufacturing

School:  Elementary  
  Secondary/High School  
  College   
 Healthcare:  Clinic  
  Hospital

Other/Miscellaneous: \_\_\_\_\_

**Facility Hours of Operation**

| Hours per Day | Days per Week | Weeks per Year | Hours per Year (hours x days x weeks) |
|---------------|---------------|----------------|---------------------------------------|
|               |               |                |                                       |

**Vendor/Contractor Information**

|                |  |              |  |       |          |
|----------------|--|--------------|--|-------|----------|
| Company Name   |  | Contact Name |  | Phone |          |
| Address        |  | City         |  | State | Zip Code |
| Email Address* |  |              |  |       |          |

\*By providing your email address, you are granting The Utility permission to send emails regarding this project and/or updates on the incentive program.

**Payment Information**

Process payment to:  Customer (listed above)  
  Vendor or Contractor (listed above)  
  Alternate Recipient

**If payment is to be made to an Alternate Recipient, please complete the remainder of this section:**

|              |  |              |  |       |          |
|--------------|--|--------------|--|-------|----------|
| Company Name |  | Contact Name |  | Phone |          |
| Address      |  | City         |  | State | Zip Code |

# Forklift Lithium Battery, Electric Forklift, and Tow Tractor Incentive Application for Business Customers

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| A. Class 1 or Class 2 Electric Forklifts or Class 6 Tow Tractors   |              |                      |  |                        |
|--|--------------|----------------------|--|------------------------|
| Incentive does not apply to units used in refrigerated portions of warehouses and food processing facilities, or in areas where OSHA or FDA regulations make electric units standard practice. |              |                      |  |                        |
| <b>Units Operating 3 Shifts</b>  |              |                      |  |                        |
| <b>Manufacturer</b>  | <b>Model</b> | <b>Serial Number</b> | <b>Incentive Each</b>  | <b>Total Incentive</b> |
|  |              |                      | \$2,000  |                        |
|  |              |                      | \$2000   |                        |
|  |              |                      | \$2000   |                        |
| Equipment Type: <input type="checkbox"/> Class 1 Forklift <input type="checkbox"/> Class 2 Forklift <input type="checkbox"/> Class 6 Tow Tractor   |              |                      | <input type="checkbox"/> Replacing Internal Combustion Forklift or Tow Truck |                        |
| Ownership type: <input type="checkbox"/> Purchase <input type="checkbox"/> Lease If Lease ____ years (3-yr min)  |              |                      | <input type="checkbox"/> Not replacing—Addition to Fleet                     |                        |
| Equipment Condition: <input type="checkbox"/> New Equipment <input type="checkbox"/> Demo or Remanufactured*   |              |                      | <input type="checkbox"/> Replacing Electric (not eligible for rebate)        |                        |
| <b>Units Operating 2 Shifts</b>  |              |                      |  |                        |
| <b>Manufacturer</b>  | <b>Model</b> | <b>Serial Number</b> | <b>Incentive Each</b>  | <b>Total Incentive</b> |
|  |              |                      | \$1500   |                        |
|  |              |                      | \$1500   |                        |
|  |              |                      | \$1500   |                        |
| Equipment Type: <input type="checkbox"/> Class 1 Forklift <input type="checkbox"/> Class 2 Forklift <input type="checkbox"/> Class 6 Tow Tractor   |              |                      | <input type="checkbox"/> Replacing Internal Combustion Forklift or Tow Truck |                        |
| Ownership type: <input type="checkbox"/> Purchase <input type="checkbox"/> Lease If Lease ____ years (3-yr min)  |              |                      | <input type="checkbox"/> Not replacing—Addition to Fleet                     |                        |
| Equipment Condition: <input type="checkbox"/> New Equipment <input type="checkbox"/> Demo or Remanufactured*   |              |                      | <input type="checkbox"/> Replacing Electric (not eligible for rebate)        |                        |
| <b>Units Operating 1 Shift</b>   |              |                      |  |                        |
| <b>Manufacturer</b>  | <b>Model</b> | <b>Serial Number</b> | <b>Incentive Each</b>  | <b>Total Incentive</b> |
|  |              |                      | \$1000   |                        |
|  |              |                      | \$1000   |                        |
|  |              |                      | \$1000   |                        |
| Equipment Type: <input type="checkbox"/> Class 1 Forklift <input type="checkbox"/> Class 2 Forklift <input type="checkbox"/> Class 6 Tow Tractor   |              |                      | <input type="checkbox"/> Replacing Internal Combustion Forklift or Tow Truck |                        |
| Ownership type: <input type="checkbox"/> Purchase <input type="checkbox"/> Lease If Lease ____ years (3-yr min)  |              |                      | <input type="checkbox"/> Not replacing—Addition to Fleet                     |                        |
| Equipment Condition: <input type="checkbox"/> New Equipment <input type="checkbox"/> Demo or Remanufactured*   |              |                      | <input type="checkbox"/> Replacing Electric (not eligible for rebate)        |                        |
| <b>Subtotal Section A:</b>   |              |                      | <b>\$</b>  |                        |

\*Demo or remanufactured units must be under 5 years old and carry the same warranty as a new unit.

Total number of forklifts at this facility prior to this project (not including hand trucks/pallet jacks, also referred to as Class 3):

Propane: \_\_\_\_\_ Diesel : \_\_\_\_\_ Electric: \_\_\_\_\_

Total number of Class 6 Tow Tractors at this facility prior to this project:

Propane: \_\_\_\_\_ Diesel : \_\_\_\_\_ Electric: \_\_\_\_\_

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| B. Lithium Battery for Electric Forklifts and Tow Tractors (minimum 24 hour operation required) |       |                  |     |  |                        |                 |
|---|-------|------------------|-----|--|------------------------|-----------------|
| Manufacturer  | Model | Serial Number(s) | Qty | Shifts Operated<br>(minimum of 3 to qualify for incentive)   | Incentive Per Forklift | Total Incentive |
|   |       |                  |     | <input type="checkbox"/> 3 (24/hrs/day—5 days/week)<br><input type="checkbox"/> 4 (24 hrs/day—7 days/week) | \$600                  |                 |
|   |       |                  |     | <input type="checkbox"/> 3 (24/hrs/day—5 days/week)<br><input type="checkbox"/> 4 (24 hrs/day—7 days/week) | \$600                  |                 |
|   |       |                  |     | <input type="checkbox"/> 3 (24/hrs/day—5 days/week)<br><input type="checkbox"/> 4 (24 hrs/day—7 days/week) | \$600                  |                 |
|   |       |                  |     | <input type="checkbox"/> 3 (24/hrs/day—5 days/week)<br><input type="checkbox"/> 4 (24 hrs/day—7 days/week) | \$600                  |                 |
|   |       |                  |     | <input type="checkbox"/> 3 (24/hrs/day—5 days/week)<br><input type="checkbox"/> 4 (24 hrs/day—7 days/week) | \$600                  |                 |

Total number of forklifts at this facility to this project (not including hand trucks/pallet jacks, also referred to as Class 3):

Propane: \_\_\_\_\_ Diesel: \_\_\_\_\_ Electric: \_\_\_\_\_

Total number of Class 6 Tow Tractors at this facility:

Propane: \_\_\_\_\_ Diesel: \_\_\_\_\_ Electric: \_\_\_\_\_

|  |                        |
|--|------------------------|
|  | Subtotal Section B: \$ |
|--|------------------------|

| Summary of Incentives  |    |
|--|----|
| Subtotal Section A: Class 1 or Class 2 Electric Forklifts or Class 6 Electric Tow Tractors | \$ |
| Subtotal Section B: Lithium Battery Charger  | \$ |
| Total Incentive  | \$ |

# Forklift Lithium Battery, Electric Forklift, and Tow Tractor Incentive Application for Business Customers

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PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:

- Spec sheet or literature clearly showing forklift or battery type.
- Invoice showing make, model year, model number, serial number, cost, purchase or lease date, and lease term (if applicable.)

TERMS:

- Only electric forklifts and tow tractors purchased or leased before December 31 of the year indicated on this application, as identified by the sales contract attached to the application, are eligible.
- The incentive is available for the purchase or lease of a new Class 1 (counterbalance), Class 2 (narrow aisle) Electric Forklift or Class 6 Electric Tow Tractor. Dealer demo or remanufactured units less than 5 years old, with the same written warranty as new, are eligible. If leased, the lease term must be for a minimum of three years.
- Forklift or tow tractor must be a new addition to the fleet or replacing an existing internal combustion forklift. No rebate is offered for units replacing existing electric forklifts.
- Customer must be an industrial or commercial Utility customer who is in good standing, and the electric forklifts and/or tow tractors under this incentive application must be operated for a minimum of three years at a commercial address with an active meter receiving electric service from the Utility.
- Customer agrees to maintain the electric forklift and/or tow tractor and to promptly repair as needed during the first three years of operation.

### Certifications and Signature

I hereby certify that:

1. The information contained in this application is accurate and complete;
2. All installation is complete and the unit(s) is operational prior to submitting application;
3. All rules of this incentive program have been followed;
4. I have read and understand the terms and conditions applicable to this incentive program as set forth in this application, including those set forth on the last page of this application form.

The customer agrees to verification of equipment installation which may include a site inspection by a program or utility representative. The customer understands that it is not allowed to receive more than one incentive from this program on any piece of equipment. The customer agrees to indemnify, defend, hold harmless and release The Utility from any claims, damages, liabilities, costs and expenses (including reasonable attorneys' fees) arising from or relating to the removal, disposal, installation or operation of any equipment or related materials in connection with the programs described in this application, including any incidental, special or consequential damages.

Please sign and complete all information below.

**I CERTIFY THAT THE FORKLIFTS AND/OR TOW TRACTORS FOR WHICH I HAVE APPLIED FOR AN INCENTIVE ARE NOT REPLACING EXISTING ELECTRIC FORKLIFTS OR TOW TRACTORS.**

|                    |            |      |
|--------------------|------------|------|
| Customer Signature | Print Name |      |
|                    | Title      | Date |

### Commercial BES Application Checklist

Before submitting this application please complete and include all items listed below:

- ✓ **Complete application**
  - Customer information
  - Vendor/Contractor information
  - Equipment information
  - Customer signature
- ✓ **Attach a Copy of the Invoice**
  - Equipment quantities
  - Model numbers of equipment installed
- ✓ **Specification sheets**

| Member Utility Use Only            |  | Date Received:       |                |
|------------------------------------|--|----------------------|----------------|
| Pre-Inspected:                     | <input type="checkbox"/> Yes <input type="checkbox"/> No | Date Pre-Inspected:  | Initials:      |
| Post-Inspected:                    | <input type="checkbox"/> Yes <input type="checkbox"/> No | Date Post-Inspected: | Initials:      |
| Incentive Approved:                | <input type="checkbox"/> Yes <input type="checkbox"/> No | Amount \$            | Date Approved: |
| Utility or Program Representative: |  |                      |                |

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## ELIGIBILITY:

- These incentives are offered by Missouri River Energy Services and its participating members. For questions regarding eligibility, call your local utility listed on the cover page of this application.
- Commercial, industrial, and governmental customers who purchase electricity from The Utility are eligible to participate in the Bright Energy Solutions® (BES) Forklift Lithium Battery, Electric Forklift, and Tow Tractor Incentive program. Eligible equipment must be connected to an electric service billed under a commercial or industrial rate class by The Utility. Excludes equipment for residential spaces such as apartments.
- Customers that self-generate more than 5% of their annual energy needs are not eligible for BES rebates. The Bright Energy Choices green energy program can help customers achieve net-zero carbon or 100% renewable power supply without self-generation. Contact your utility for more information.
- This program is applicable only to equipment that meets the detailed equipment specifications and requirements described in this application. The Utility will determine, in its discretion, whether such specifications and requirements are satisfied.
- Customers may not receive more than one incentive for each piece of equipment installed under this program or any combination of Bright Energy Solutions programs.

## TERMS AND CONDITIONS:

1. **Incentive Offer:** Installation must be completed by December 31 of the year indicated on this application. A signed application and itemized invoices for materials and labor must be submitted to the participating utility at the address located on the cover page of this application **within 90 calendar days of project completion**. Please keep a copy for your records.
2. **Proof of Purchase:** This application must have complete information and be submitted with an invoice(s) itemizing the new equipment purchased or leased. Lease term must be included if applicable. The invoice(s) must indicate date of purchase (or lease), make, model, model year, serial number and cost.
3. **Compliance:**
  - a) All projects must comply with federal, state, and local code, licensing, and permit requirements.
  - b) All equipment must be new. Dealer demo or remanufactured units with the same written warranty as new may also be eligible with utility preapproval.
  - c) Equipment must meet specification requirements and be purchased, installed and operating prior to submitting an incentive application.
  - d) Equipment must not be used to qualify and receive payment for energy savings from any wholesale electricity market.
  - e) Customers may only receive one incentive per piece of qualifying equipment.
  - f) **All projects for which more than \$20,000 in incentive payments is sought must be approved by The Utility prior to the commencement of the project.** Receipt of pre-approval does not guarantee incentive payments will be made.
  - g) All terms and conditions of this application must be satisfied by the customer.
4. **Payment:** Once completed paperwork is submitted, incentive payments are usually made within 4-8 weeks. Incomplete applications will either delay payments or be denied. The Utility reserves the right to refuse payment and participation if the customer or the customer's contractor violates program rules and procedures.
5. **Inspection:** The Utility may conduct an inspection of the customer's facility to survey any installed projects. All projects exceeding \$10,000 of incentives will be inspected prior to incentive payment. The Utility may inspect customer records relating to incentives sought by the customer.
6. **Information Sharing:** The Utility reserves the right to publicize your participation in this program, unless you specifically request otherwise in writing. Information contained in this application may be shared with state boards, commissions, departments, and other Bright Energy Solutions participating utilities.
7. **Program Discretion:** Incentives are available on a first-come, first-served basis. This program and its incentive amounts are subject to change or termination without notice at the discretion of The Utility. Neither pre-approval of a project, nor any other action by The Utility, will entitle a customer to an incentive payment until the application is finally approved by The Utility. The Utility reserves the right to load manage (cycle on or off) customer equipment that qualifies for incentives under this program.
8. **Logo Use:** Customers or trade allies may not use the name or logo of Bright Energy Solutions, The Utility, or any other participating utility in any marketing, advertising, or promotional material without written permission.
9. **Disclaimers:** The Utility
  - a) does not endorse any particular manufacturer, product, labor or system design by offering these programs;
  - b) will not be responsible for any tax liability imposed on the customer as a result of the payment of incentives;
  - c) does not expressly or implicitly warrant the installation or performance of installed equipment or any contractor's quality of work (contact the equipment manufacturer or contractor for warranties);
  - d) is not responsible for the proper disposal/recycling of any waste generated as a result of this project;
  - e) is not liable for any damage, injury, or loss of life arising from or relating to the removal, installation, or operation of any equipment, or any other action taken by the customer or The Utility, in connection with a project undertaken by the customer under the programs described in this application;

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## INCENTIVE LIMIT:

- **Eligible customers may purchase and install qualifying equipment and receive an energy efficiency incentive of up to \$100,000 per customer, per calendar year.** Payments for larger incentives may be allowed at the discretion of The Utility.
- Total incentive will not exceed 75 percent of the project cost, including installation. If self-installed, incentives for items of equipment can be up to the purchase price of a specific item, but shall not exceed the Bright Energy Solutions incentives set by Missouri River Energy Services.
- Incentives for particular items of equipment and/or systems are limited as set forth in this application.