



Electricity Retailer Licence Application

Usource

1. Application Type

1. (a) Application Type

New Renewal

2. The Applicant

2. (a) Legal Name of the Applicant

Usource

2. (b) Business Classification

Sole Proprietorship Partnership Corporation Other

If other, please describe.

Usource is an L.L.C. formed in the state of Delaware

2. (c) Date of Formation or Incorporation

March 31, 2000

2. (d) Province/State of Formation or Incorporation

Delaware

2. (e) Country of Formation or Incorporation

United States of America

2. (f) If the applicant is an individual, are they at least 18 years old?

If the applicant is an individual, the applicant must be at least 18 years old.

Yes No Not Applicable

2. (g) Head Office or Business Address of the Applicant

Street Address: 100 Domain Drive, Suite 111

City: Exeter

Province/State: New Hampshire

Country: United States of America

Postal/Zip Code: 03833

Website: <https://www.usourceenergy.com/>

Main Phone Number and Email Address

Phone Number: 888-686-4845

Toll Free: 888-686-4845

Email Address: MyAdvisor@UsourceEnergy.com

2. (h) Please describe the applicant's current or intended line of business and business activities.

Usource is an unbiased, independent energy consulting firm for large businesses and organizations. With a focus on market intelligence and solutions that support a smart, forward-looking energy management strategy, Usource provides a comprehensive suite of energy consulting services, from energy procurement, engineering solutions, to renewable consulting to its clients. Usource, a member of the NextEra Energy family of companies, serves as a trusted advisor known for its unbiased approach. With a firm commitment to objectivity, Usource leverages the vast resources and expertise of NextEra Energy, the world's largest producer of wind and solar energy, to offer customized energy consulting services to large commercial, industrial, institutional and governmental organizations. Planning and executing a transition from a conventional energy management program to one that integrates renewable sources and technologies requires specific skills and expertise. Getting it done right requires the cultivation of a strong and attentive client relationship. Every client is different in the way they approach their goals and the internal and external challenges they have in achieving them. We shape our services to help clients better understand and navigate the relatively new, complex and evolving world of traditional energy sources, sustainability, and renewables.

3. Licence Primary Contact

The licensee shall designate a person who will act as a primary contact with the Ontario Energy Board (OEB) on matters related to the licence.

3. (a) Licence Primary Contact

Salutation: Mr.

Last Name: Betterton

First Name: Evan

Initials: EFB

Title/Position: Manager, Regulatory and Legislative Affairs

Company: NextEra Energy (Usource Parent)

Phone Number: 786-697-4935

Email Address: regulatory@nexteraenergyservices.com

3. (b) Is the Licence Primary Contact address the same as the Head Office or Business address?

Yes No

Licence Primary Contact Address

Street Address: 601 Travis Street, Suite 1400

City: Houston

Province/State: Texas

Country: United States of America

Postal/Zip Code: 77002

Website: <https://www.usourceenergy.com/>

NOTE: If the Licence Primary Contact Address is not in Ontario, the applicant must also provide the contact information for service purposes in Ontario. The applicant may provide the address of an agent (an individual who is a resident of Ontario and

is at least 18 years old, or a corporation that has its head office or registered office in Ontario) as the contact for service.

3. (c) Contact Information for Service in Ontario

Salutation: Ms.

Last Name: Madina

First Name: Paula

Initials: PM

Title/Position: Administrative Technician

Company: NextEra Energy

Phone Number: 518-930-7870

Email Address: Paula.Madia@nexteraenergy.com

Address for Service in Ontario

Street Address: 390 Bay St.

City: Toronto

Province/State: Ontario

Country: Canada

Postal/Zip Code: M5H1W2

Website: <https://www.usourceenergy.com/>

4. Application Primary Contact

The primary contact for the licence application may be a person within the applicant's organization other than the licence primary contact noted above. An applicant may also choose to designate a consultant, lawyer, etc. to be the primary contact for the licence application. The OEB will communicate with this person during the course of the application review process, but with the licence primary contact after a licence is issued.

4. (a) Is the Application Primary Contact the same as the Licence Primary Contact?

Yes No

5. Customer Complaint or Inquiries Primary Contact

Provide contact information of the person to whom correspondence or communication regarding customer complaints or inquiries should be addressed. The mailing address should be in Ontario and the phone number should be listed in Ontario. If the applicant intends to retail electricity to low-volume consumers (annually consuming less than 150,000 kilowatt hours of electricity), the applicant should also provide a toll-free phone number for the general public to use.

5. (a) Customer Complaint or Inquiries Primary Contact

Salutation: Ms.

Last Name: Clifford

First Name: Brianna

Initials: BC

Title/Position: Business Analyst

Company: Usource, L.L.C.

Phone Number: 888.686.4845

Toll Free: 888.686.4845

Email Address: brianna.clifford@nexteraenergy.com

Customer Complaint or Inquiries Primary Contact Address

Street Address: 390 Bay St.

City: Toronto

Province/State: Ontario

Country: Canada

Postal/Zip Code: M5H1W2

Website: <https://www.usourceenergy.com/>

6. Trade Names

The electricity retailer licence authorizes the licensee to conduct business using the name under which the licence is held (i.e. the applicant's legal name). It also provides for the use of trade names by the licensee.

6. (a) Does the applicant intend to use trade names?

Yes No

If yes, please provide a list of trade names the applicant intends to use.

Usource

7. Applicant's Licensing Status and History

7. (a) Has the applicant, an affiliate of the applicant, or an associated entity (e.g. a partnership or limited partnership) ever been licensed by the OEB?

Yes No

The *Business Corporations Act* definition for "affiliate" can be found at www.e-laws.gov.on.ca.

7. (b) Does the applicant, an affiliate of the applicant, or an associated entity (e.g. a partnership or limited partnership) have any other application(s) before the OEB?

Yes No

7. (c) Has the applicant, an affiliate of the applicant, or an associated entity (e.g. a partnership or limited partnership) ever undertaken energy sector activity in any other jurisdiction within North America?

Yes No

If yes, please provide information about activities in other jurisdictions.

Company Name	Relation to the Applicant	Jurisdiction	Business Activity	Name of Licensing Body and Licence/Registration No. (if applicable)
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Usource	Applicant	United States	energy brokering and consulting for multiple commodities and other energy efficiency related work	Please see attached document for complete list.
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7. (d) Is the applicant, an affiliate of the applicant, or an associated entity (e.g. a partnership or limited partnership) an Independent Electricity System Operator (IESO) market participant?

Yes No

8. Officers, Directors and Key Individuals

8. (a) Please confirm the number of officers, directors and key individuals in your organization.

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8. (b) In the table below, identify the key individuals that are responsible for executing the following functions for the applicant: matters related to regulatory requirements and conduct, financial matters and technical matters.

Key individuals include the Chief Executive Officer, the Chief Financial Officer, other officers and directors, partners or proprietors.

NOTES:

- List a minimum of 3 key individuals in the table below. Additional information about each key individual is required in Section 17.
- One of the listed key individuals must sign the completed application. See Section 19 for signing authority details.

Name of Key Individual	Email	Title/Position within Applicant's Business (or identify company if not the Applicant's Business)
Ryan McGeachie	Ryan.Mcgeachie@gexaenergy.com	President
Scott Macdonald	Scott.Macdonald@usourceenergy.com	Managing Director
Melissa Lauderdale	Melissa.Lauderdale@gexaenergy.com	Executive Director, Regulatory

9. Intended Markets and Services

9. (a) Identify the applicant's intended markets and services. Select all that apply.

- To sell or offer to sell electricity to low-volume consumers (annually consuming less than 150,000 kilowatt hours of electricity) in Ontario.
- To sell or offer to sell electricity to large-volume consumers (annually consuming more than 150,000 kilowatt hours of electricity) in Ontario.
- To sell electricity generated by a renewable generation facility under a Power Purchase Agreement (i.e. retail contract) to a low-volume consumer who will be entering into a net metering arrangement with their distributor. To learn more, click [here](#).
- To sell electricity generated by a renewable generation facility under a Power Purchase Agreement (i.e. retail contract) to a large-volume consumer who will be entering into a net metering arrangement with their distributor. To learn more, click [here](#).
- To act as an agent or broker for a retailer with respect to the sale or offering for sale of electricity to low-volume consumers, or as an agent or broker for low-volume consumers with respect to the sale or offering for sale of electricity in Ontario.

- To act as an agent or broker for a retailer with respect to the sale or offering for sale of electricity to large-volume consumers, or as an agent or broker for large-volume consumers with respect to the sale or offering for sale of electricity in Ontario.

9. (b) Is the applicant currently providing any of the above listed services?

- Yes No

9. (b_yes) If yes, provide a list of the services the applicant is currently providing.

Applicant currently provides energy brokering services in 14 states. Please see attached list for states and products.

9. (c) Wholesale Market Participation: Does the applicant intend to operate in the IESO-administered markets and settle bilateral contracts through the IESO?

- Yes No

9. (c_no) If no, please explain how the applicant intends to participate.

Applicant only intends to provide brokering services in Ontario.

9. (d) Retail Market Participation: Does the applicant intend to settle the wholesale market cost of electricity consumed by its customers through a distributor's settlement system?

- Yes No

9. (d_no) If no, please explain how the applicant intends to participate.

Applicant only intends to provide brokering services in Ontario.

9. (e) Describe in detail the applicant's current or intended business model and product offering(s). Include details of all products the applicant intends to offer to its customers and explain how the commodity pricing will be determined for each of the applicant's product offering.

Usource is an unbiased, independent energy consulting firm for large businesses and organizations. With a focus on market intelligence and solutions that support a smart, forward-looking energy management strategy, Usource provides a comprehensive suite of energy consulting services, from energy procurement, engineering solutions, to renewable consulting to its clients. Usource, a member of the NextEra Energy family of companies, serves as a trusted advisor known for its unbiased approach. With a firm commitment to objectivity, Usource leverages the vast resources and expertise of NextEra Energy, the world's largest producer of wind and solar energy, to offer customized energy consulting services to large commercial, industrial, institutional and governmental organizations. Planning and executing a transition from a conventional energy management program to one that integrates renewable sources and technologies requires specific skills and expertise. Getting it done right requires the cultivation of a strong and attentive client relationship. Every client is different in the way they approach their goals and the internal and external challenges they have in achieving them. We shape our services to help clients better understand and navigate the relatively new, complex and evolving world of traditional energy sources, sustainability, and renewables. Applicant only intends to provide brokering services, primarily to large volume customers within Ontario. Usource will be procuring bids from licensed suppliers and providing those offers to our customers.

9. (f) Does the applicant intend to acquire any services from the third-party service providers (e.g. customer service, call centre, settlement services)?

- Yes No

CONFIDENTIAL SECTIONS

Information filed as part of or in support of sections 10 to 17 of this application will be treated as confidential and is not available for public view.

18. Notice

The OEB is authorized, under section 4.14 of the [OEB Act](#), to collect personal information for the purpose of carrying out its duties and exercising its powers under the OEB Act or any other Act.

The information provided both on this form and attached to this form is being collected by the OEB for the purpose of determining whether the applicant is qualified to receive the licence for which it is applying.

In order to verify the information on this form and/or determine whether the applicant is qualified to receive the licence for which it is applying, it may be necessary for the OEB to collect additional information from some or all of the following sources: federal, provincial/state, or municipal governments; licensing bodies; law enforcement agencies; credit bureaus; and banks. Only information relevant to the application or the OEB's determination of the application will be collected by the OEB.

The public official who can answer questions about the collection of the information is:

Registrar

Ontario Energy Board

P.O. Box 2319

2300 Yonge Street, 27th Floor

Toronto, ON M4P 1E4

Tel: 416-481-1967 or 1-888-632-6273

Applicants are reminded that the OEB is subject to the [Freedom of Information and Protection of Privacy Act](#) (FIPPA). FIPPA addresses circumstances in which the OEB may, upon request, be required to release information that is in its custody or under its control, and generally prohibits the OEB from releasing personal information. "Personal Information" has the meaning given to it under FIPPA.