

ENERGY STAR® Partnership Agreement

For Lenders



Information For Display on the ENERGY STAR Web Site

See General Commitments for ENERGY STAR Partners for requirements that must be met before getting displayed on the Web.

Organization Name: _____

Telephone: _____ States served: _____

Web site address: _____

Lender Requirements

Type of Energy Efficient Mortgage (EEM) and/or Energy Improvement Mortgage (EIM) Offered (check all that apply):

- FHA
- Fannie Mae
- Freddie Mac
- VA
- Other (please describe) _____
(Write "ENERGY STAR Mortgage" if participating in the ENERGY STAR Mortgage Pilot Program)

Method of Promoting EEMs and/or EIMs and ENERGY STAR (check all that apply):

- On company Web site;
- Distributing promotional materials at local branches
- Other _____

Other Requirements (check to acknowledge):

- Each business office has a staff person who can process EEM or EIM applications and can ably answer consumer questions about EEMs or EIMs, ENERGY STAR and ENERGY STAR qualified homes.
- Lender must submit proof of having written one EEM or EIM to gain access to resources reserved for active partners, and at least three EEMs or EIMs every 12 months to maintain active partner status (Pilot program participants do not need to submit proof of having written one ENERGY STAR Mortgage but do need to write at least three ENERGY STAR Mortgages every 12 months)
- Lender must report to EPA the number of EEMs and/or EIMs written each year
- Lender must adhere to the ENERGY STAR Identity Guidelines and the ENERGY STAR Web Linking Guidelines (available at www.energystar.gov/marks and www.energystar.gov/partners, respectively)
- Lenders participating in the ENERGY STAR Mortgage Pilot Program must adhere to all current Program rules and requirements (www.energystar.gov/homes Click on link for Lenders)

Contact Information

Authorized Company Representative (printed name): _____

Title: _____ E-mail¹: _____
1 A valid e-mail address is required for online access to the ENERGY STAR marks

Address: _____ City/State/Zip: _____

Telephone: _____ Fax: _____

Signature: _____ Date: _____

To be completed by US EPA:

Kathleen Hogan; Director, Climate Protection Partnerships Division, U.S. Environmental Protection Agency

Signature: _____ Date: _____

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Fax this form to:

ENERGY STAR for Homes-Finance Partnership
202-343-2200

For more information please call the ENERGY STAR Hotline at 1-888-STAR-YES or visit: www.energystar.gov/homes

ENERGY STAR Background Information

EPA's ENERGY STAR helps consumers, businesses, and public organizations protect the environment through superior energy efficiency. ENERGY STAR for Homes promotes energy-efficient homes that can improve builder profitability, improve home quality and homeowner comfort, lower energy demand, and reduce air pollution. The goal of the ENERGY STAR lender partnership is to provide lenders with a marketing platform they can use to promote financing products that can help prospective homebuyers purchase an ENERGY STAR qualified home, and help educate prospective homebuyers on the benefits of owning an energy-efficient, ENERGY STAR qualified home.

ENERGY STAR's Commitments to Partners

1. Increase awareness of the ENERGY STAR label by distributing key messages on the benefits of ENERGY STAR qualified homes and homes-related products.
2. Provide (via the ENERGY STAR Web site, Hotline, e-mail or other means) current ENERGY STAR news, information, and reference documents.
3. Provide ENERGY STAR Lender Partners with public recognition through the online ENERGY STAR partner locator tool.
4. Respond expeditiously to any Partner requests for information or clarification on ENERGY STAR policies.

General Commitments for ENERGY STAR Lender Partners

1. Use the Partnership and the ENERGY STAR label to promote energy efficiency as an easy and desirable option for new homebuyers to prevent pollution, protect the environment, and save money on energy bills. No lending organization is permitted to use ENERGY STAR's Certification Mark to promote itself or its loan programs or products.
2. Adhere to the *ENERGY STAR Identity Guidelines* (available at www.energystar.gov/marks) and ensure that authorized representatives, such as advertising agencies, also comply.
3. Adhere to the *ENERGY STAR Web Linking Guidelines* (available at www.energystar.gov/partners). Failure to do so can result in the loss of linking privileges from the ENERGY STAR Web site.
4. If participating in the ENERGY STAR Mortgage Pilot Program, adhere to the current Program's rules and requirements (www.energystar.gov/homes).
5. Submit to ENERGY STAR a copy of a home energy rating report used by the lender to write an EEM or EIM. This is required before the lender can access partners-only resources such as the ENERGY STAR partners-only marks and listing on the ENERGY STAR Web site. This commitment does not apply for lenders partnering under the ENERGY STAR Mortgage Pilot Program.
6. Every 12 month period starting from the time the lender's initial access to the ENERGY STAR marks is activated, submit to ENERGY STAR copies of three home energy rating reports or other documents showing energy savings used by the lender partner to write three EEMs or EIMs (or approved ENERGY STAR Mortgages) during the past consecutive 12 months. This is required for the lender to maintain active partner status, or to reactivate its partnership. Only active partners can use ENERGY STAR partners-only marks and be listed on ENERGY STAR's Web site.
7. Promote EEMs and/or EIMs (or approved ENERGY STAR Mortgages) and ENERGY STAR on their Web sites or by distributing brochures or other promotional material at local branches.
8. Have a staff person at each business office who can process EEM and/or EIM applications (or ENERGY STAR Mortgage applications) and who can ably answer consumer questions about EEMs and/or EIMs (or approved ENERGY STAR Mortgages).
9. Report to EPA the number of EEMs and/or EIMs (or approved ENERGY STAR Mortgages) written each year.
10. Do not imply, directly or indirectly, that any loan product or service has been approved, accepted, or endorsed by the federal government. For example, do not use the terms "ENERGY STAR EEM" or "ENERGY STAR Mortgage" or "ENERGY STAR Loan". Only lenders participating in the ENERGY STAR Mortgage Pilot Program may use the term "ENERGY STAR Mortgage" and only in reference to mortgages approved as ENERGY STAR Mortgages.

General Terms and Disclaimers

1. Partner will not construe, claim, or imply that its participation in ENERGY STAR constitutes federal government approval, acceptance, or endorsement of anything other than the Partner's commitment to ENERGY STAR. Partnership does not constitute federal government endorsement of the Partner or its homes or services.
2. Partner understands that the activities it undertakes in connection with ENERGY STAR are voluntary and not intended to provide services to the federal government. As such, the Partner will not submit a claim for compensation to any federal agency.
3. Partner and ENERGY STAR will assume good faith as a general principle for resolving conflict and will seek to resolve all matters informally, so as to preserve maximum public confidence in ENERGY STAR.
4. This agreement is voluntary and can be terminated by either party at any time for any reason, with no penalty.
5. Failure to comply with any of the terms of this Partnership Agreement can result in its termination and cessation of access to the benefits of ENERGY STAR, including use of the marks.
6. ENERGY STAR will actively pursue resolution of noncompliance related to the use of the ENERGY STAR marks.