

EQUITABLE/UGI Energy

Attachment # 31  
(11/5)



January 10, 2014

PLUM BOROUGH SCHOOL DISTRICT AUTHORITY  
900 Elicker Road  
Pittsburgh, PA 15239

**Re:** Agreement(s) for the Purchase and Sale of Natural Gas between PLUM BOROUGH SCHOOL DISTRICT AUTHORITY and EQT Energy, LLC, d/b/a Equitable Energy (the "Agreement")

**Assignment of Agreement(s) to UGI Energy Services LLC**

Dear Customer:

It has been our privilege to serve your natural gas needs. However, EQT Energy, LLC d/b/a Equitable Energy (Equitable Energy) has decided to focus its efforts on other segments of the natural gas business and, as a result, intends to reduce its participation in the retail markets. Equitable Energy has selected UGI Energy Services, LLC (UGI Energy Services), a reputable and licensed natural gas provider, to assume your existing natural gas sales and supply contract and has entered into an agreement to assign your contract to UGI Energy Services. Upon completion of this transaction, UGI Energy Services will become your natural gas supplier, effective April 1, 2014, under the same terms and conditions set forth in our existing Agreement.

UGI Energy Services, a Pennsylvania company, is a licensed retail supplier and sells natural gas, liquid fuels and electricity to approximately 17,000 commercial and industrial customers at approximately 41,000 locations in Pennsylvania, New Jersey, Delaware, New York, Ohio, Maryland, Virginia, North Carolina, Massachusetts, and the District of Columbia. UGI Energy Services is one of the largest marketers of natural gas in the region and has been providing reliable natural gas supplies to its customers since 1985.

How does this news affect you? You shouldn't notice any changes at all. Between now and April 1<sup>st</sup>, Equitable Energy will work closely with UGI Energy Services to transfer your account. Both parties are communicating this assignment to regulatory agencies and to your local natural gas distribution company.

Pursuant to the provisions of your Agreement with Equitable Energy, your Agreement may be assigned after obtaining your consent. Equitable Energy hereby requests your consent to the assignment of your Agreement to UGI Energy Services.

UGI Energy Services will administer your natural gas needs at the same prices, terms and conditions that you currently receive with respect to gas quantities for which you have currently



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contracted. You will continue to receive the same high quality service you have come to expect from Equitable Energy. To ensure a smooth transition, please complete the following simple steps as soon as possible:

1. Indicate your consent to the assignment of the Agreement and release Equitable Energy from any further obligations under the Agreement by signing the consent letter. (attachment 1)
2. If you are an Equitable Gas Company customer, we request that you complete a new Agency Agreement and Assignment of Balancing Privileges form (attachment 2). This form will allow UGI Energy Services to act as your agent on Equitable Gas Company and perform the same services that Equitable Energy currently does.
3. Next, if applicable, please complete the new Sales Tax Exemption Form (attachment 3).

We have enclosed a self-addressed stamped envelope for you to mail the originals back to UGI Energy Services. Or, if you prefer, please email or fax these completed forms no later than February 21, 2014 to Chip Powers at [cpowers@ugies.com](mailto:cpowers@ugies.com) or Fax no. (412) 920-0669. If you should have any questions, Chip Powers can be reached at (412) 920-0800 or you may contact your current account executive.

For future reference, the mailing address for UGI Energy Services is:

UGI Energy Services, LLC  
Foster Plaza 10, Suite 200  
680 Andersen Drive  
Pittsburgh, PA 15220

Again, thank you for allowing us to serve your natural gas needs in the past. We have enjoyed our business relationship and wish you continued success.

Sincerely,

William E. ("Chip") Glunt  
Director, Retail Marketing  
Equitable Energy

WEG:djm



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**ATTACHMENT 1**

January 10, 2014

**Consent Letter**

**Re: Assignment of Gas Purchase and Sales Agreement(s) between PLUM BOROUGH SCHOOL DISTRICT AUTHORITY and EQT Energy, LLC d/b/a Equitable Energy (the "Agreement(s)") to UGI Energy Services, LLC.**

**I hereby consent to the assignment of the Agreement(s) with EQT Energy, LLC to UGI Energy Services, LLC or to one of UGI Energy Services' affiliates and release EQT Energy, LLC from any further obligations under the Agreement(s). This consent will be effective on April 1, 2014.**

\_\_\_\_\_  
[Customer Name]

\_\_\_\_\_  
[Signature]

\_\_\_\_\_  
[Print Name]

\_\_\_\_\_  
[Date]

\_\_\_\_\_  
[Phone Number]

\_\_\_\_\_  
[E-Mail Address]

**An e-mail acknowledgment will be sent to you within one day of receipt.**

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**pennsylvania**

DEPARTMENT OF REVENUE

BUREAU OF  
BUSINESS TRUST FUND TAXES  
PO BOX 280901  
HARRISBURG, PA 17128-0901

# **PENNSYLVANIA EXEMPTION CERTIFICATE**

**CHECK ONE:**

- ☒ STATE OR LOCAL SALES AND USE TAX  
☐ STATE OR LOCAL HOTEL OCCUPANCY TAX  
☐ PUBLIC TRANSPORTATION ASSISTANCE TAXES AND FEES (PTA)  
☐ VEHICLE RENTAL TAX (VRT)

(Please Print or Type)

This form cannot be used to  
obtain a Sales Tax License  
Number, PTA License Number  
or Exempt Status.

Read Instructions  
On Reverse Carefully

**THIS FORM MAY BE PHOTOCOPIED - VOID UNLESS COMPLETE INFORMATION IS SUPPLIED**

- CHECK ONE:** ☐ PENNSYLVANIA TAX UNIT EXEMPTION CERTIFICATE (USE FOR ONE TRANSACTION)  
☒ PENNSYLVANIA TAX BLANKET EXEMPTION CERTIFICATE (USE FOR MULTIPLE TRANSACTIONS)

Name of Seller, Vendor, or Lessor  
UGI Energy Services, LLC

Street	City	State	ZIP Code
One Meridian Blvd., Suite 2C01	Wyomissing	PA	19610

**NOTE:** Do not use this form for claiming an exemption on the registration of a vehicle. To claim an exemption from tax for a motor vehicle, trailer, semi-trailer or tractor with the PA Department of Transportation, Bureau of Motor Vehicles, use one of the following forms:

- FORM MV-1 Application for Certificate of Title (first time registrations)  
 FORM MV-4ST Vehicle Sales and Use Tax Return/Application for Registration (other registrations)

Property and services purchased or leased using this certificate are exempt from tax because: (Select the appropriate paragraph from the back of this form, check the corresponding block below and insert information requested.)

- ☐ 1. Property or services will be used directly and predominately by purchaser in performing purchaser's operation of \_\_\_\_\_
- ☐ 2. Purchaser is a/an: \_\_\_\_\_
- ☐ 3. Property will be resold under License Number \_\_\_\_\_ (If purchaser does not have a PA Sales Tax License Number, include a statement under Number 7 explaining why a number is not required.)
- ☐ 4. Purchaser is a/an: \_\_\_\_\_ holding Exemption Number \_\_\_\_\_
- ☐ 5. Property or services will be used directly and predominately by purchaser performing a public utility service.  
☐ PA Public Utility Commission PUC Number \_\_\_\_\_ and/or ☐ US Department of Transportation MC/MX \_\_\_\_\_
- ☐ 6. Exempt wrapping supplies, License Number \_\_\_\_\_ (If purchaser does not have a PA Sales Tax License Number, include a statement under Number 7 explaining why a number is not required.)
- ☐ 7. Other \_\_\_\_\_  
 (Explain in detail. Additional space on reverse side.)

I am authorized to execute this Certificate and claim this exemption. Misuse of this Certificate by seller, lessor, buyer, lessee, or their representative is punishable by fine and imprisonment.

Name of Purchaser or Lessee	Signature	EIN	Date
Street	City	State	ZIP Code

**1. ACCEPTANCE AND VALIDITY:**

For this certificate to be valid, the seller/lessor shall exercise good faith in accepting this certificate, which includes: (1) the certificate shall be completed properly; (2) the certificate shall be in the seller/lessor's possession within 60 days from the date of sale/lease; (3) the certificate does not contain information which is knowingly false; and (4) the property or service is consistent with the exemption to which the customer is entitled. For more information, refer to Exemption Certificates, Title 61 PA Code §32.2. An invalid certificate may subject the seller/lessor to the tax.

**2. REPRODUCTION OF FORM:**

This form may be reproduced but shall contain the same information as appears on this form.

**3. RETENTION:**

The seller or lessor must retain this certificate for at least four years from the date of the exempt sale to which the certificate applies.

**DO NOT RETURN THIS FORM TO THE PA DEPARTMENT OF REVENUE.**

**4. EXEMPT ORGANIZATIONS:**

This form may be used in conjunction with form REV-1715, Exempt Organization Declaration of Sales Tax Exemption, when a purchase of \$200 or more is made by an organization which is registered with the PA Department of Revenue as an exempt organization. These organizations are assigned an exemption number, beginning with the two digits 75 (example: 75-00000-0).

PLUM BOROUGH SCHOOL DISTRICT AUTHORITY  
PO BOX 980

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Ellwood City PA 16117

### AGENCY AGREEMENT

The parties agree that UGI Energy Services, LLC or its designee may act as an agent for the Customer identified above ("Buyer") for the purpose of arranging on behalf of Buyer, with their party transporters for the transportation from the Sales Point(s) to the Delivery Point(s) of the gas acquired by Buyer pursuant to the terms of this Agreement. Such arrangement shall be deemed to include the administration of such transportation arrangements and for the payment of charges therefore.

Executed as of the date below.

WITNESS:

SELLER: By: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

UGI Energy Services, LLC

BUYER: By: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

PLUM BOROUGH SCHOOL DISTRICT AUTHORITY

Pool Enrollment Effective Date: 04/01/2014

Customer Number	Location Number	Account Number
3731460	310225	003731460000026
3731460	181433	003731460000018
3250040	324137	003250040000018
3731460	318692	003731460000034
2479624	250239	002479624000018
3731460	436997	003731460000042