



Incentifind™

Case Studies 2022

Commercial

Multifamily Complex: Existing Building

Las Vegas, Nevada Metro

A **Building Owner & Operator** was upgrading their large multifamily complex in the **Las Vegas metro** because it was outdated, inefficient, and maintenance costs were starting to affect the company's bottom line. While coming to IncentiFind during the final close-out of a project is not an ideal time to leverage IncentiFind, the APPLY team was still able to capture funds across six incentive programs due to the utility not requiring project approval prior to equipment installation.

Within a few months, IncentiFind not only identified incentives for the Building Owner & Operator's project, but also assisted the Building Owner & Operator in earmarking over \$158,000 for natural gas, water conservation, and EV charging station rebates (cash reimbursements post-construction). Additional cost-savings were identified in renewable tax incentives, however, they chose not to pursue solar for this site. Typically Multifamily isn't an ideal asset type to reap tax incentives for basic, operational upgrades but thanks to Cost Segregation and accelerated depreciation, **this apartment complex boasted over \$367,000 in total real estate incentive over the course of 18 months.**

Cost-Savings From Incentives: **\$367,000**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **18 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 10 | 4 |
| Water Conservation | 1 | 1 |
| Renewables | 1 | 0 |
| Other | 5 | 0 |

Captured Incentives

| |
|--|
| Building Owner & Operator installed above-code EE equipment equaling a total of \$113,000 in rebates. |
| Building Owner & Operator installed MultiFamily Electric Vehicle Charging Stations equaling a total of \$15,000 in rebates. |
| Developer/Owner installed Water Saving landscape irrigation equipment equaling a total of \$30,000 in rebates. |
| Building Owner & Operator ran this project under Cost Segregation and the accelerated depreciation for the project came out to \$209,000 over the course of their ownership. |

Furniture Showroom: Existing Building

Oklahoma City, Oklahoma City Metro Area

A **Building Owner & Operator** was planning a LED and HVAC retrofit to their 85,000 square foot furniture showroom because their company brand standards had been upgraded by corporate to meet certain sustainability goals. This project was set outside of **Oklahoma City** and identifying all cost-savings was the owner’s highest priority. During the Feasibility Design Phase the Building Owner & Operator came to IncentiFind, which is an ideal time to identify and capitalize on cash incentives for a project.

Within a few months IncentiFind not only identified incentives for the Building Owner & Operator project, but also assisted the Building Owner & Operator in earmarking over \$39,000 for LED Lighting & Controls, HVAC Equipment, & Natural Gas Equipment rebates (cash reimbursements post-construction). Additional cost-savings were identified in tax incentives for Work Opportunity Tax Credit Program, Cost Segregation Study, & Commercial 179D Studies. **Over the course of 12 months, this furniture showroom boasted over \$103,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$103,500**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **12 months**

VERIFY Report Fee: **\$1,750**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 6 | 3 |
| Water Conservation | 0 | 0 |
| Renewables | 0 | 0 |
| Other | 8 | 3 |

Captured Incentives

- Building Owner & Operator installed Natural Gas equipment equaling a total of \$11,000 in rebates.
- Building Owner & Operator installed above-code EE equipment equaling a total of \$28,000 in rebates.
- Building Owner & Operator received the Work Opportunity Tax Credit in the amount of \$9,600 in rebates.
- Building Owner & Operator received fund from a Commercial 179D Study in the amount of \$28,400 which they passed along to the project designers
- Building Owner & Operator received the funds from a Cost Segregation Study in the amount of \$26,000.

Sports Complex: New Construction

Wisconsin

A **Public University** was constructing a ground up, new construction sports stadium in **Southern Wisconsin** because as the school's student body population increased, they needed another complex to accommodate the sports activities on the campus. Identifying all cost-savings became the Building Owner's highest priority. During the Detailed Design Phase the Sustainability Consultant came to IncentiFind, which is an ideal time to identify incentives on a project.

Within a few months, IncentiFind not only identified incentives for the Building Owner's project, but also assisted the Building Owner in earmarking over \$194,000 for HVAC Equipment, Lighting and Custom rebates (cash reimbursements post-construction). Additional cost-savings were identified in tax incentives for 179D Commercial Buildings Energy Efficiency Tax Deduction and DirtRoad Community Charging. **Over the course of 25 months, this new construction sports complex boasted over \$306,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$306,000**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **25 months**

VERIFY Report Fee: **\$350**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 11 | 9 |
| Water Conservation | 1 | 0 |
| Renewables | 2 | 0 |
| Other | 7 | 1 |

Captured Incentives

- Building Owner installed above-code Lighting equipment equaling a total of \$35,000 in rebates.
- Building Owner installed above-code EE equipment equaling a total of \$54,500 in rebates.
- Building Owner installed HVAC, Plumbing and Refrigeration equipment equaling a total of \$94,000 in rebates.
- Building Owner participated in Process Systems and Custom Incentives programs equaling a total of \$10,500 in rebates.
- Building Owner installed Electric Vehicle equipment equaling a total of \$17,000 in rebates.
- Building Owner received the 179D Energy Efficiency Tax Credit in the amount of \$95,000 which they passed along to the project designers.

Public Higher Education: Existing Building

Dallas-Fort Worth Metro Area

A Public Community College in Texas was planning a major upgrade to some campus buildings because they needed to update classrooms and labs to meet the needs for the new coursework. Identifying all cost-savings became the Public Entity's highest priority. During the Conceptual Design Phase the Facilities Director came to IncentiFind an ideal time to identify incentives on a project.

Within a few months, IncentiFind not only identified incentives for the Public Entity's project, but also assisted the Public Entity in earmarking over \$54,000 for (Energy Efficiency and Renewables) rebates (cash reimbursements post-construction). Additional cost-savings were identified in tax incentives for 179D Commercial Buildings Energy Efficiency Tax Deduction, Tax Recovery Services, and Holistic Utility Management Solutions. **Over the course of 9 months, this Higher Education Existing Building boasted over \$96,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$96,000**

(Cash Reimbursements & Tax Incentives)

VERIFY Report Fee: **\$500**

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **9 months**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 6 | 3 |
| Water Conservation | 3 | 2 |
| Renewables | 3 | 2 |
| Other | 5 | 4 |

Captured Incentives

- Public Entity installed above-code EE equipment, equaling a total of \$4,000 in rebates.
- Public Entity participated in Commercial Standard and Custom Offer programs equaling a total of \$20,000 in rebates.
- Public Entity installed Water Saving plumbing equipment equaling a total of \$9,000 in rebates.
- Public Entity installed above-code Renewable energy solutions equaling a total of \$21,000 in rebates.
- Public Entity received the Texas LoanSTAR Public Sector Loan Program in the amount of \$9,500.
- Public Entity participated in Holistic Utility Management Solutions and Tax Recovery Systems in the amount of \$14,500.
- Public Entity received the 179D Energy Efficiency Tax Credit in the amount of \$13,000 which they passed along to the project designers.

Mixed Use: Existing Building

Baltimore Metro Area, Maryland

A **Building Owner and Operator** was doing a major gut rehabilitation project in the **Baltimore metro** because the old school building sat vacant for years prior to being purchased for a repurposed Mixed Use building with multifamily and retail. Identifying all cost-savings became the Building Owner and Operator’s highest priority. Early into the Feasibility Phase, the Building Owner and Operator came to IncentiFind which is the perfect time to identify incentives on a project.

Within a month, IncentiFind not only identified incentives for the Building Owner and Operator’s project, but also assisted the Building Owner and Operator in reserving over \$91,500 for energy efficient HVAC equipment and LED Lighting rebates (cash reimbursements post-construction). Additional cost-savings were identified in tax incentives for DirtRoad Community Charging, Business Energy Investment Tax, and New Markets Tax Credit. **Over the course of a year, this mixed use existing building boasted over \$292,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$292,000**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **12 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 12 | 5 |
| Water Conservation | 0 | 0 |
| Renewables | 3 | 2 |
| Other | 19 | 5 |

Captured Incentives

- Building Owner/Operator installed above-code EE Lighting equipment equaling a total of \$19,500 in rebates.
- Building Owner/Operator installed above-code EE HVAC equipment equaling a total of \$72,000 in rebates.
- Building Owner/Operator installed Community EV charging equipment, equaling a total of \$10,000.
- Building Owner/Operator installed Solar PV equipment, equaling a total of \$6,500 in bill credit.
- Building Owner/Operator received a total of \$79,500 for Clean and Renewable Energy tax credits
- Building Owner/Operator received a total of \$104,500 for Business Energy Investment Tax Credit and other tax credits.

Bio Pharmaceutical Lab: New Construction

Raleigh Metro Area, North Carolina

An Architect was assigned to design a ground up, state of the art pharmaceutical campus in the Raleigh metro. Because of the complexity of the space spanning five buildings, identifying cost-savings for the Owner was on the forefront of the Architecture Firm's mind. After they were awarded the project, the Architect came to IncentiFind to help obtain cost-savings for the project. Engaging during the detailed design phase is an ideal time to identify incentives on any project.

Within a few months, IncentiFind not only identified incentives, but also assisted the Architect in earmarking over \$141,000 for high efficient HVAC + Process systems, LED Lighting, Custom Lab equipment and EnergyStar Commercial Kitchen rebates. Additional cost-savings were identified in tax incentives through a Community EV Charging Program, Job Development Grant and the Federal 179D Tax Deduction. **Over the course of 15 months, this new construction biopharmaceutical lab boasted over \$ in total real estate incentives.**

Cost-Savings From Incentives: **\$467,500**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **15 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 14 | 8 |
| Water Conservation | 0 | 0 |
| Renewables | 1 | 0 |
| Other | 7 | 3 |

Captured Incentives

- Architect installed above-code EE Lighting and HVAC equipment equaling a total of \$75,000 in rebates.
- Architect received funds in the amount of \$24,000 for the Custom Incentive program.
- Architect participated in the Demand Response Automation program for a total of \$30,000.
- Architect installed natural gas equipment equaling a total of \$12,000 in rebates.
- Architect installed Community EV charging equipment, equaling a total of \$7,500.
- Architect received Cost Segregation Studies in the amount of \$117,000.
- Architect received the Commercial 179D Tax Credit in the amount of \$102,000 which they passed along to the project designers.
- Architect's project received Job Development in the amount of \$100,000.

Public Port Authority: Existing Building

Southern Texas

The **Port Authority** essentially acts as a public institution, so in the Conceptual Phase the Building's Facilities Director came to IncentiFind to ensure they maximize the available incentive cost-savings. Earlier is always better when it comes to identifying incentives on a project.

The building is located near the coastline of **Southern Texas** and is on the National Registry of Historic Buildings. The scope of the retrofit includes basic MEP upgrades such as LED Lighting and more efficient HVAC systems. Both capturing additional money for the project and preserving the buildings' historic character became the Facilities Director's utmost concern.

IncentiFind has found eligible incentives in a succinct VERIFY Report, and are also assisting the site reserve over \$70,000 for HVAC and LED Lighting rebates from the local utility. Additional cost-savings were identified in financial incentives for Historic Preservation, Grants for Public Sector Upgrades and EV Charging Station consulting. **Over the course of 7 months, this existing building upgrade is expected to boast over \$120,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$121,000**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **7 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 6 | 3 |
| Water Conservation | 0 | 0 |
| Renewables | 2 | 1 |
| Other | 9 | 3 |

Captured Incentives

- Port Authority installed energy efficient heating, cooling, and lighting equipment equaling a total of \$60,000 in rebates.
- Port Authority installed renewable energy equipment equaling a total of \$12,500 in rebates.
- Port Authority received State and federal grants for building upgrades, equaling a total of \$52,000 in project savings.

Affordable Multifamily: New Construction

South Carolina

The Developer, who is also the Building Owner and Operator, was planning to build a ground-up new construction 300 unit apartment complex in **South Carolina** which will include lower-income housing. Once the site was selected and financing for the project was secured, the Developer submitted a project survey to IncentiFind to identify cost savings rewarding affordable housing. In addition to housing incentives, the mechanical and structural scope of the project was influenced by the utility rebates available.

By engaging with IncentiFind during the early design stage, the customer was able to reserve over \$131,000 for highly efficient HVAC systems, Lighting, Appliances and Insulation and Roofing rebates. On top of the utility cash reimbursements, cost-savings were identified in tax incentives through New Market Tax Credits and Water conservation tax credits. A Fannie Mae loan rewarding the multi-family development was also awarded. **Over the course of 20 months, this brand new apartment complex was able to boast over \$437,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$437,000**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **20 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 5 | 4 |
| Water Conservation | 1 | 0 |
| Renewables | 0 | 1 |
| Other | 8 | 5 |

Captured Incentives

- Developer installed above-code LED lighting fixtures equaling a total of \$26,000 in rebates.
- Developer installed above-code HVAC and cooling equipment equaling a total of \$45,000 in rebates.
- Developer installed energy efficient appliances equaling a total of \$43,000 in rebates
- Developer installed qualified building insulation equaling a total of \$28,000 in rebates.
- Developer received tax credits, grants, and deductions including a New Markets Tax credit, equaling a total of \$205,000 in project savings.
- Developer received various loan awards, equaling a total of \$90,000 in project savings.

Public Hospital: New Construction

Miami Area, Florida

A **Public Hospital** was being constructed, ground-up, in the **Miami area** as population growth in the suburb meant an additional hospital in the metro was necessary. Being a Public Entity, taking advantage of cost-savings became their highest priority along with keeping the project on schedule. During the Conceptual Design phase, which is an ideal time to identify incentives on a project, the MEP Engineer introduced the Hospital Facilities Directors to IncentiFind.

Within 18 months IncentiFind not only identified incentives for the Building Owner’s project, but also assisted the Building Owner in earmarking over \$98,000 for HVAC, Cooling, and EV charging rebates (cash reimbursements post-construction). Additional cost-savings were identified in tax incentives for energy efficiency. **Over the course of 18 Months, this Public Hospital boasted over \$98,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$98,000**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **18 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 8 | 5 |
| Water Conservation | 0 | 0 |
| Renewables | 1 | 1 |
| Other | 3 | 1 |

Captured Incentives

- Building Owner/Operator installed Efficient Heating & Cooling equipment equaling a total of \$31,300 in rebates.
- Building Owner/Operator received the 179D Energy Efficiency Tax Credit in the amount of \$30,000.
- Building Owner/Operator installed EV charging equipment equaling a total of \$25,000 in rebates.
- Building Owner/Operator received High-Impact Performance Incentive Grants equaling a total of \$11,000.

Multi-Building Redevelopment: New Construction

Houston Area, Texas

The Developer and City had been working together for years to revitalize the Historic Downtown District in a small, but growing town, in the Southwest Houston Metro. Both Private investors and the City curated a Downtown Revitalization Plan which included a Master Planned Community to meet housing needs, and Commercial properties such as a Brewery, Mixed-Use Retail, a Daycare, and Food Hall to bring in much desired revenue. Identifying all cost-savings became the Developer & Building Owner’s highest priority. During the Conceptual Design phase the Sustainability Consultant introduced the Developer & Building Owner to IncentiFind; this is an ideal time to identify incentives on a project.

Within 3 months, IncentiFind not only identified incentives for the Developer & Building Owner’s project, but also assisted the Developer & Building Owner in earmarking over 525,000 for energy efficiency rebates (cash reimbursements post-construction). Additional cost-savings were identified in tax incentives for Wind Power Energy Exemptions, Water Conservation Exemptions, Commercial 179D Tax Credits, etc. **Over the course of 3 months, this Multi-Building Development boasted over 1.5 million in total real estate incentives.**

Cost-Savings From Incentives: **\$1.5 million**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

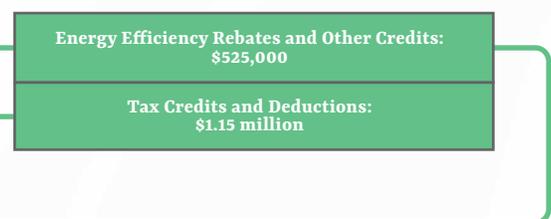
Project Timeframe: **3 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 4 | 2 |
| Water Conservation | 3 | 2 |
| Renewables | 4 | 4 |
| Other | 13 | 7 |

Captured Incentives



Assisted Senior Living: Existing Building

Las Vegas Area, Nevada

The Owner and Operator was planning a significant renovation to their Assisted Living Apartment complex in the Las Vegas metro area. The apartments, and common areas on site, were in need of mechanical and cosmetic upgrades in order to improve overall conditions and lower annual maintenance costs. Identifying all cost-savings became the Building Owner and Operator's highest priority. So during the Early Planning/Design Stage, the customer approached IncentiFind (an ideal time to identify incentives on a project).

Within 3 months IncentiFind not only identified incentives for the Building Owner and Operator's project, but also assisted the Building Owner and Operator in earmarking over \$55,000 for energy efficiency, renewables, and various other rebates (cash reimbursements post-construction). Additional cost-savings were identified in tax incentives for Commercial 179D Tax Deductions, New Market Tax Credits, and Energy Investment Tax Credits. **Over the course of 3 months, this Assisted Senior Living Complex boasted over 151,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$151,000**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

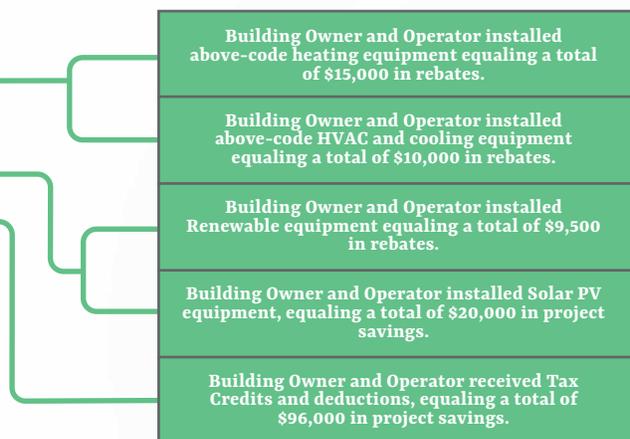
Project Timeframe: **3 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 9 | 3 |
| Water Conservation | 0 | 0 |
| Renewables | 5 | 4 |
| Other | 14 | 11 |

Captured Incentives



Large Convention Hotel: Existing Building

Baton Rouge Area, Louisiana

The **Hotel Operator** was looking to implement as much electric & gas energy-saving equipment as budgetary constraints allowed in order to aggressively meet corporate sustainability goals in the **Baton Rouge area**. In order to meet these corporate targets, identifying all available cost-savings for specific equipment became the Operator's highest priority. During the Detailed Design phase the client came to IncentiFind, which allowed ample time to design with certain equipment in mind that was rewarded through utility rebates and tax incentives.

Within 2 months IncentiFind not only identified incentives for the Building Owner and Operator's project, but also assisted them in earmarking over \$43,000 for energy efficiency and various other rebates (cash reimbursements post-construction). Additional cost-savings were identified in tax incentives for a Commercial 179D Tax Deduction and a Business Energy Investment Tax Credit. **Over the course of 2 months, this Large Convention Hotel boasted over \$111,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$111,000**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **2 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 4 | 3 |
| Water Conservation | 0 | 0 |
| Renewables | 2 | 1 |
| Other | 21 | 5 |

Captured Incentives

- Building Owner and Operator installed above-code heating equipment equaling a total of \$26,500 in rebates.
- Building Owner and Operator installed above-code commercial kitchen equipment equaling a total of \$16,000 in rebates.
- Building Owner and Operator received Tax Credits for the installation of Renewable equipment equaling a total of \$28,000 in rebates.
- Building Owner and Operator received various Tax Credits and deductions, equaling a total of \$40,000 in project savings.

Warehouse Rooftop Solar: Existing Building

Houston Metro, Texas

The Building Owner & Operator was installing a 1.5 MW rooftop Solar PV system in the **Houston metro area** to help achieve their corporate goal of going Net-Zero by 2025. Therefore, identifying all cost-savings became the Building Owner & Operators highest priority. During the Tendering Phase, the Architect on the project introduced the client to IncentiFind shortly after the project awarded a GC to the project, which for this solar rebate program, was an ideal time to identify incentives on a project.

Within 2 months IncentiFind not only identified incentives, but also assisted the Building Owner & Operator in earmarking over \$149,000 for renewables and solar PV rebates (cash reimbursements post-construction). Additional cost-savings were identified in tax incentives for Business Energy Investment Tax Credit, Solar Energy Tax Deduction, Wind-Powered Energy Device Exemption, and Property Tax Abatements. The client was so impressed with IncentiFind, they lined up several other solar projects for their facilities nationwide. **Over the course of 2 months, this Warehouse boasted over \$360,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$360,000**

(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **2 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 2 | 0 |
| Water Conservation | 0 | 0 |
| Renewables | 6 | 5 |
| Other | 6 | 3 |

Captured Incentives

| |
|---|
| Building Owner and Operator installed rooftop Solar PV equipment, equaling a total of \$149,000 in project savings and rebates. |
| Building Owner and Operator received Property Tax Abatements equaling a total of \$19,000 in project savings. |
| Building Owner and Operator received a Business Energy Investment Tax Credit, Solar Energy Tax Deduction, and a Solar-Powered Energy Device Exemption equaling a total of \$192,000 in project savings. |

Mixed Use Building: Existing Building

Chicago Metro, Illinois

A **Nonprofit Organization** was doing a complete renovation of their facility, down to the studs, right outside of **Chicago**. The renovation was necessary in order to bring the building up to Code. In doing so, the Non-Profit wanted to create a safe, healthy and energy efficient environment while keeping operational and maintenance costs down. During the Conceptual Design Phase the Architecture + Engineering firm introduced the Nonprofit Organization to Incentifind which is a perfect time to think about incentives for a project.

Within 9 months Incentifind not only identified incentives for the project, but also assisted the organization in reserving over \$51,000 for HVAC, building controls, water heating, LED indoor lighting, commercial kitchen equipment, and building insulation rebates (cash reimbursements post-construction). Additional cost-savings were identified in tax incentives for Net Zero Energy Building Program and Green Improvements for Tomorrow Program. **Over the course of 9 months, this Mixed-Use Building boasted over \$73,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$73,000**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **9 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 16 | 8 |
| Water Conservation | 0 | 0 |
| Renewables | 1 | 0 |
| Other | 18 | 6 |

Captured Incentives

- The Nonprofit Organization installed above-code HVAC heating + cooling equipment equaling a total of \$29,000 in rebates
- The Nonprofit Organization installed above-code LED Lighting + Controls equipment equaling a total of \$15,000 in rebates
- The Nonprofit Organization installed above-code Building Envelope + Fenestration equaling a total of \$7,000 in rebates
- The Nonprofit Organization also received Grants, Fee Waivers and other Funds for Green Building equaling a total of \$22,000 in project

Air Conditioned Storage: New Construction

Charlotte Area, North Carolina

The Developer was building a ground-up Air Conditioned Storage in the **Charlotte area** in order to accommodate the influx of residential development in the region. In order to keep it within budget and on schedule, identifying all cost-savings became the Developer's highest priority. The Developer leveraged IncentiFind during the conceptual design phase (a perfect time to identify incentives on a project*).

Within 2 months IncentiFind not only identified incentives for the Developer's project but also assisted in earmarking over \$74,000 for energy efficiency and renewable energy rebates (cash reimbursements post-construction). Additional cost-savings were identified with a 179D Tax Deduction, a Clean Energy Investment Tax Credit, and a 2022 Tax Exemption for Solar Energy from the State. **Over the course of 7 months, this Air Conditioned Storage facility boasted over \$191,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$194,500**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **7 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 4 | 1 |
| Water Conservation | 0 | 0 |
| Renewables | 4 | 3 |
| Other | 7 | 5 |

Captured Incentives

- The Developer installed above-code LED Lighting equipment equaling a total of \$11,000 in rebates.
- The Developer received a 2022 Clean Energy Investment Tax Credit and a 2022 Tax Exemption for Solar Energy equaling a total of \$43,500 in tax savings.
- The Developer installed Solar PV equipment, equaling a total of \$26,000 in project savings and rebates.
- The Developer received a 179D tax deduction and a Renewable Energy Systems & Improvement Loan and Grant equaling a total of \$77,000 in tax savings.
- Developer took various measures to improve energy conservation and reduce consumption during peak periods, resulting in a total of \$37,000 in bill credits.

Hotel Conversion: New Construction

Tulsa Area, Oklahoma

The Developer and Building Owner was converting an older, 85-room Hotel in **Tulsa** into multifamily dwelling units in order to cut down on costs associated with a ground-up new-build. That being said, finding any and all cost-savings was a priority for the client. The Developer and Building Owner approached IncentiFind during the construction phase which generally can be cutting it close (since incentives often require approval prior to construction), but in this case, we were able to secure funds for the project.

Within 11 months IncentiFind not only identified incentives for the Developer and Building Owner's project but also assisted in earmarking over \$23,000 for energy and water efficiency rebates (cash reimbursements post-construction). Additional cost-savings were identified in tax incentives for EV charging stations and a Fannie Mae Green Rewards Program. **Over the course of 11 months, this Hotel Conversion boasted over \$75,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$75,000**

(Cash Reimbursements & Tax Incentives)

VERIFY Report Fee: **\$500**

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **11 months**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 4 | 3 |
| Water Conservation | 0 | 0 |
| Renewables | 1 | 0 |
| Other | 10 | 1 |

Captured Incentives

The Developer/Owner installed energy efficient LED Lighting fixtures qualifying them for a total of \$8,500 in rebates.

The Developer/Owner installed above-code HVAC and natural gas equipment equaling a total of \$12,000 in rebates.

The Developer/Owner received custom rebates on various efficient and upgraded appliances, earning a total of \$3,500 in project savings.

The Developer/Owner received Tax incentives in the form of EV Charging Stations for a total of \$10,000 in project savings

The Developer/Owner received loans from Fannie Mae Green Rewards programs, equaling a total of \$32,000 in upfront capital.

Large MultiFamily Portfolio: Existing Buildings

U.S. Nationwide: 18 states, 47 cities

The Building Owner and Operator was completing an analysis of green building incentives available to **72 properties across 18 states and 47 cities** in order to align to their aggressive company-wide Environmental + Sustainability Goals (ESGs). While implementing their green building strategy was the priority, identifying all cost-savings associated with the planned upgrades became critical to the Owner-Operator to keep the project on time and within budget. During the Feasibility and Early Design phase, the Owner-Operator was introduced to IncentiFind, which is an ideal time to identify incentives on a project.

Within the time of purchasing the VERIFY Reports and authorizing IncentiFind's APPLY Services (approximately 3 weeks), IncentiFind identified over **\$8M** in rebates (cash reimbursements post-construction) and **\$18M** in tax-related incentives for the portfolio of 72 Large MultiFamily Complexes.

The APPLY Services Team worked closely with the incentive administrators and reserved an average of \$96,000 in rebates per property. Additionally, there were also cost-savings identified in tax incentives which yielded an average of \$201,000 per property.

Over the course of the construction period, **this Large MultiFamily Portfolio boasted over \$21.4M across 72 properties in total real estate incentives.**

Average Cost-Savings per Property: \$297,000
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: 25% (Contingency Fee)

Project Timeframe: 10 months

Total Soft Estimate: \$27.56 million

VERIFY Report Fee: \$150 with large portfolio price break

Captured Incentives:

Eligible Incentives: Across 72 properties*

| Number Identified | Number Selected |
|-------------------|-----------------|
| 1,738 | 632 |

| |
|---|
| HVAC energy efficiency incentives |
| LED lighting energy efficiency incentives |
| Solar PV equipment incentives |
| Window fixture energy efficiency incentives |
| Water conserving plumbing fixtures |
| Solar PV tax credits |
| 45L Energy efficiency tax credits |
| Property tax abatements |

Private Medical Office: Existing Building

Orlando Metro, Florida

The Building Owner was planning to renovate their facility in the **Orlando area** and wanted to save money replacing the older, outdated equipment while simultaneously reducing energy and maintenance costs. During the Detailed Design Phase the Building Owner purchased a VERIFY Report to identify project specific incentives available. As a rule of thumb, the sooner in the project phase the customer engages with IncentiFind, the more eligible the project will be for incentives.

Within 3 months, IncentiFind not only identified incentives for the Building Owner's project, but also assisted them in earmarking over \$39,000 for energy efficiency, renewables, and various other rebates (cash reimbursements post-construction). Additional cost-savings were identified in these tax incentives: Clean Energy Investment Tax Credit, 179D Tax Deduction, and a Statewide Solar Energy Tax Exemption. Over the course of 6 months, **this Private Medical Office boasted nearly \$90,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$89,500**

(Cash Reimbursements & Tax Incentives)

VERIFY Report Fee: **\$500**

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **6 months**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 6 | 6 |
| Water Conservation | 0 | 0 |
| Renewables | 1 | 1 |
| Other | 5 | 5 |

Captured Incentives

| |
|--|
| Building Owner installed efficient LED Lighting fixtures equaling a total of \$5,000 in rebates. |
| Building Owner installed above-code HVAC and cooling equipment equaling a total of \$15,000 in rebates. |
| Building Owner upgraded the structure's insulation, equaling a total of \$10,000 in rebates. |
| Building Owner leverages a Solar Energy System Sales Tax Exemption, equaling a total of \$13,500 in tax savings. |
| Building Owner received a Clean Energy Investment Tax Credit and Commercial 179D Tax deduction, equaling a total of \$46,000 in tax savings. |

Commercial Office - Gut Rehab: Existing Building

Charlotte Area, North Carolina

The Building Owner and Operator bought a vacant building in the **Charlotte area** with the intent to renovate the space to meet LEED Gold Standards in order to save Operating + Maintenance (OM) costs, along with achieving greater incentive savings upfront. To maximize the ROI of going LEED certified, identifying all cost-savings became the Building Owner and Operator's highest priority. During the Detailed Design Phase the client came to IncentiFind, which is an ideal time to identify incentives on a project.

Within 6 weeks, IncentiFind not only identified incentives for the project, but also assisted the Building Owner and Operator in reserving over \$33,000 for LED lighting, HVAC, and Holistic Major Renovation/Building Envelope rebates. Additional cost-savings were identified in tax incentives for Commercial 179D tax deduction, Solar PV Tax exemption, and a Local Building Reuse Grant. Over the course of 5 months, **this Commercial Office Gut Rehab project boasted ~\$95,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$95,000**

(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **4 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 6 | 3 |
| Water Conservation | 1 | 0 |
| Renewables | 1 | 1 |
| Other | 12 | 4 |

Captured Incentives

| |
|---|
| Developer/Owner installed above-code water heating equipment equaling a total of \$5,000 in rebates. |
| Developer/Owner installed above-code LED Lighting equipment equaling a total of \$10,000 in rebates. |
| Developer/Owner installed above-code HVAC and cooling equipment equaling a total of \$14,000 in rebates. |
| Developer/Owner installed Solar PV equipment, equaling a total of \$20,000 in project savings. |
| Developer/Owner received Tax Credits and deductions, equaling a total of \$28,000 in project savings. |
| Other - Developer/Owner received a Local Building Reuse Grant, equaling a total of \$18,000 in project savings. |

Senior Housing Portfolio: Existing Buildings

U.S. Southeast: 4 states, 8 cities

The Property Asset Manager was planning facility upgrades at each of their **10 properties in the Southeastern United States**. They were able to realize cost savings and achieve faster Return on Investment (ROI) by purchasing VERIFY Reports for each site and identifying incentives in line with their scope. The Asset Management Company came to IncentiFind during the Early Design Phase which is a perfect time to identify incentives on a project as it's always better to engage sooner than later.

Within 4 weeks IncentiFind not only identified incentives for the Property Asset Manager's project, but also assisted the customer in earmarking an **average of \$53,500 per property** for energy efficiency, water efficiency, and renewable energy rebates (cash reimbursements post-construction). Additional cost-savings were identified in **tax incentives which yielded an average of \$174,000 per property**.

Over the course of 11 months, this Senior Housing Portfolio boasted over **\$2.54 M in total real estate incentives across 10 properties**.

Average Cost-Savings per Property: **\$227,500**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Total Soft Estimate: **\$2.54 million**

Project Timeframe: **11 months**

VERIFY Report Fee: **\$250** with portfolio price break

Captured Incentives:

Eligible Incentives: Across 10 properties*

| Number Identified | Number Selected |
|-------------------|-----------------|
| 227 | 73 |

| |
|--|
| Water heating energy efficiency incentives |
| LED lighting energy efficiency incentives |
| Smart thermostat incentives |
| Energy efficient appliance incentives |
| Water conserving plumbing fixtures |
| Solar PV tax credits |
| 179D Energy Efficiency Credit |
| Housing exemptions |

Grocery Store: Existing Building

Albuquerque Area, New Mexico

The Developer was planning for capital expenses for the upcoming year in the **Albuquerque area**, and was interested in incentive savings that could help keep the project within budget and meet corporate ESG goals. The developer approached Incentifind during the Feasibility Phase in order to strategize and plan for the capital improvements the grocery store desperately needed.

Within 1 month, Incentifind not only identified incentives for the Developer's project, but also assisted the Developer in earmarking over \$23,000 for energy efficiency, water conservation, renewable energy, and building improvement rebates (cash reimbursements post-construction). Additional cost-savings were identified in these tax incentives: 179D Energy Efficiency Tax Deduction, Sustainable Building Tax Credit, and a Small Business Assistance Loan. Over the course of 7 months, **this Grocery Store boasted over \$68,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$68,000**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **7 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 8 | 3 |
| Water Conservation | 3 | 2 |
| Renewables | 6 | 2 |
| Other | 10 | 7 |

Captured Incentives

| |
|--|
| Developer installed LED lighting equipment equaling a total of \$2,500 in rebates. |
| Developer installed above-code HVAC and cooling equipment equaling a total of \$9,000 in rebates. |
| Developer landscaped with native, drought tolerant plants equaling a total of \$3,000 in water conservation rebates. |
| Developer installed rainwater barrels, equaling a total of \$2,000 in project rebates. |
| Developer installed renewable energy equipment equaling a total of \$10,500 in combined project savings. |
| Developer received a Sustainable Building Tax Credit, equaling a total of \$11,000 in project savings. |
| Developer received green building Tax Credits and deductions, equaling a total of \$30,000 in project savings. |

Church + Private School: New Construction

Washington D.C. Area

The Construction Management team wanted to add value to their client in the Washington D.C. area by presenting incentives which rewarded the already planned Design. Not only was this a valued addition to the Construction Management team, but also allowed them (the GC) to receive a portion of the cash savings as part of IncentiFind's Affiliate program. The GC came to IncentiFind during the Final Design Phase and encouraged the Building Owner to authorize IncentiFind for APPLY Services.

Within 6 weeks IncentiFind not only identified incentives for the General Contractor's project, but also assisted the General Contractor in earmarking over \$72,500 for energy efficiency, electric vehicle charging, and solar PV rebates. Additional cost-savings were identified in other incentives for EV Charging, Solar Canopy Grants, and Fee Waivers. Over the course of 15 months, this Church + Private School boasted over \$117,500 in total real estate incentives.

Cost-Savings From Incentives: **\$117,500**
(Cash Reimbursements & Tax Incentives)

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **15 months**

VERIFY Report Fee: **\$500**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 9 | 5 |
| Water Conservation | 0 | 0 |
| Renewables | 7 | 5 |
| Other | 27 | 11 |

Captured Incentives

- General Contractor installed energy efficient LED lighting fixtures equaling a total of \$4,000 in rebates.
- General Contractor earmarked prescriptive measures for energy efficiency equaling a total of \$20,000 in rebates.
- General Contractor installed energy efficient appliances equaling a total of \$13,000 in rebates.
- General Contractor installed Renewable equipment equaling a total of \$15,500 in rebates.
- General Contractor installed Solar PV equipment, equaling a total of \$20,000 in project savings.
- Owner/Operator received other (Non-Tax) Incentives, equaling a total of \$45,000 in project savings.

Office Upgrade: Existing Building

Portland Area, Oregon

The Building Owner was upgrading their office in the **Portland area** and based on the available incentives, the Owner directed the Design team to change the scope of work and equipment selection. Identifying all cost-savings was a high priority, along with carbon reduction goals and lowering O+M costs. During the Detailed Design Phase, the customer came to IncentiFind and purchased a VERIFY Report; an ideal time to identify incentives on a project.

Within 6 weeks IncentiFind not only identified incentives for the Building owner's project, but also assisted the Building owner in earmarking over \$73,000 for electrical efficiency, renewables, and other rebates (cash reimbursements post-construction). Additional cost-savings were identified in these tax incentives: 179D Tax Deduction, Alternative Fuel Infrastructure Tax Credit, Federal Solar Investment Tax Credit. **Over the course of 6 months, this office boasted over \$151,500 in total real estate incentives.**

Cost-Savings From Incentives: **\$151,000**
(Cash Reimbursements & Tax Incentives)

VERIFY Report Fee: **\$500**

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **6 months**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 11 | 4 |
| Water Conservation | 1 | 0 |
| Renewables | 4 | 2 |
| Other | 17 | 9 |

Captured Incentives

| |
|--|
| Building Owner installed electric vehicle charging stations equaling a total of \$20,000 in rebates. |
| Building Owner installed above-code LED lighting equipment equaling a total of \$12,500 in rebates. |
| Building Owner installed above-code HVAC and water heating equipment equaling a total of \$14,000 in rebates. |
| Building Owner installed Solar PV equipment, equaling a total of \$17,500 in project savings. |
| Building Owner received Tax Credits and deductions, equaling a total of \$60,000 in project savings. |
| Building Owner received incentives targeting building gut rehabs, equaling a total of \$27,000 in project savings. |

Public K-12 School: New Construction

Austin Area, Texas

The School District approved the building of a newly constructed elementary school with the goal of it being a premier WELL certified and “green” building in the **Austin area**. In order to maximize tax and bond dollars, identifying all cost-savings became the Public School’s highest priority. During the Construction - build phase, the Architecture firm on the project introduced the district’s point of contact to Incentifind.

Within 1 month Incentifind not only identified incentives for the Public School’s project, but also assisted the the client in earmarking over \$54,000 for electrical efficiency and various other rebates (cash reimbursements post-construction). Additional cost-savings were identified in these non-tax incentives: Texas loanSTAR Program, USGBC WELL Building Fee Waiver. **Over the course of 4 months, this public school boasted over \$114,000 in total real estate incentives.**

Cost-Savings From Incentives: **\$122,000**
(Cash Reimbursements & Tax Incentives)

VERIFY Report Fee: **\$500**

Apply Services Fee: **25%** (Contingency Fee)

Project Timeframe: **4 months**

Eligible Incentives

| Incentive Type | Number Identified | Number Selected |
|--------------------|-------------------|-----------------|
| Energy Efficiency | 7 | 3 |
| Water Conservation | 0 | 0 |
| Renewables | 0 | 0 |
| Other | 14 | 6 |

Captured Incentives

- Public School installed above-code LED lighting equipment equaling a total of \$27,500 in rebates.
- Public School installed efficient commercial kitchen equipment equaling a total of \$15,000 in rebates.
- Public School installed efficient water heating equipment equaling a total of \$25,000 in rebates.
- Public School received non-tax incentives and deductions equaling a total of \$55,000 in project savings.