

START HERE!

Check boxes below when steps are completed.

MASS SAVE® HEAT LOAN HOW TO APPLY

Now that you've completed a Home Energy Assessment, are you ready to take advantage of 0% financing? Great! Everything you need to get started is in this packet.

1

Mass Save offers financing assistance for the following improvements:

Choose a contractor for the improvements you want to make.

The Mass Save Program recommends getting multiple quotes and verifying that the chosen contractor is licensed and insured. Send only the chosen quote with your application documents.

see **GREEN** checklist



Heating Equipment

see **BLUE** checklist



Central Air Conditioning

AND/OR



Air Source & Mini-Split Heat Pumps

see **BROWN** checklist



Insulation Upgrades

AND/OR



Replacement Windows

see **BLACK** checklist



Domestic & Solar Hot Water Heaters

2

Complete Section 2 of the **HEAT Loan Intake Form** (in this packet), making sure to sign it.

3

Gather **ALL** of the following documents:

- The HEAT Loan Intake Form
- The chosen contractor proposal for the improvement you'll be making
- Any other required documentation (refer to the **4 checklists** in this packet).

4

Submit **ALL** documents from step 3 through the online submission portal at MassSave.com/HEATLoan.

Upon submission, you can use this portal to follow up on the status of your application.

For information on mailing or emailing the application, refer to the back of your Intake Form.

5

Once you receive your **HEAT Loan Authorization Form**, bring it to a Participating Lender (refer to the **Lender List**, included in this packet or online at MassSave.com/HeatLoan).

6

If approved, you will receive a two-party check from the Lender. Have the contractor complete the improvements within 90 days.

7

Pay your contractor by signing over the bank check (**remember:** the loan amount is minus any eligible utility rebates).

8

Call **800-234-1307** to set up a verification inspection.

FINISH

Apply for your rebates! (Refer to **MassSave.com/Rebates** for instructions on how to apply.)