



## REFUNDS AVAILABLE FOR RELIGIOUS ORGANIZATIONS ON TELEPHONE & UTILITY ACCOUNTS

We have helped hundreds of Churches and Religious Organizations all over the US both obtain historical refunds and reduce their billing going forward. Religious organizations remain our number one vertical market. Via Energy Solutions has a deep understanding of rates and services that are unique to Churches and Religious organizations and we know how to go back to obtain a refund on your behalf.

### LET US HELP YOU TODAY!

#### COMPLIMENTARY AUDIT



We handle all of the paperwork and filing with your carriers. Our only fee is 50% of any refund we obtain on your behalf or 50% of savings being realized for 12 months.

#### CLAIM REFUNDS



You have a **90%** chance that a refund is due to you.

## WHAT IS THE NEXT STEP?

- ✓ Fill out the client agreement form
- ✓ Sign the letter of authorization that allows us to request information from your providers
- ✓ Send us a copy of one month's worth of telephone and utility billing and we do the rest!

### CONTACT US:

**Zach Ward**

Senior Energy Advisor

Email Bills To: [zward@viaenergysolutions.com](mailto:zward@viaenergysolutions.com)

[www.viaenergysolutions.com](http://www.viaenergysolutions.com)

### AUDIT TODAY!

 832.413.1863





# Starting the Audit and Recovery Process

## Client Checklist

The following items are required to begin the auditing and recovery process. Please be sure to include all applicable documents.

### VES Agreement

Please complete, sign and date the VES Forensic Bill Auditing Agreement. Provide **best point of contact** for audit correspondence.

### Letter of Authorization (LOA)

It is required that your company's logo must appear on the top of this form. If you are not able to do this, please let us know and we can help you. Date and sign the document.

### One Month's Utility Bills

Send ALL pages, front and back, even if any of the pages are blank.

- Electricity
- Natural Gas
- Telecom

### Third Party Supplier Agreements, If Applicable

If any portion of your bill is contracted with **anyone other than the utility company**, we will need the agreement you signed with that company. This is a mandatory step.

### Tax Exempt?

If your organization is a nonprofit, please include a copy of your tax-exempt form.

### Online Access

Please provide username and passwords for online access. This is optional but can **accelerate the audit process by three (3) months**.

## Completed Paperwork

Please send the completed paperwork, along with any supporting documents, to Johnathan Martin:

(281) 851-8292

J.Martin@Viaenergysolutions.com

Date:

Attention: Current Provider

As of this date, we have contracted with VIA Energy Solutions to serve as our agent for auditing and evaluating all Telecom accounts. This would include billing inquiries as well as service order activities.

Additionally, this authorization is to be in effect for any sub-contractors that are utilized by VIA Energy Solutions.

Please release whatever information they request whether it be customer service records, duplicate bill copies or any additional records.

This authorization is to be in effect from the date indicated in this letter and continue for a period of two years. If this authorization is withdrawn prior to that time, it will be canceled in writing from our office.

VIA Energy Solutions and its subcontractors are additionally authorized to pursue credits due us for past billing discrepancies and act as our agent should a refund check be desired in lieu of a credit.

Their representative will present this request when contacting your organization.

Company: \_\_\_\_\_

Federal Tax ID #: \_\_\_\_\_

Signature: \_\_\_\_\_

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

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

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



## Forensic Utility Bill Audit Agreement

The parties hereto, \_\_\_\_\_ (“Client”) and \_\_\_\_\_ (“Company”) enter into this Forensic Utility Bill Audit Agreement (“Agreement”) under the following terms and conditions:

Company will audit Client’s Utility (Electric, natural gas, telecom, etc.) billing charges for the purpose of identifying historical errors and reducing ongoing utility costs. If any errors are discovered, Company will use best efforts to have the errors removed and to obtain a refund or credit for the time that the errors existed.

### Fee

1. Company shall be compensated by Client for the services rendered as defined herein by payment of a fee equal to \_\_\_\_% of the amount of past refunds or credits identified or realized.
2. Company shall also be compensated by Client for the services rendered as defined herein by payment of a fee equal to \_\_\_\_% of the go-forward savings for 12 consecutive months. This savings is achieved with the current vendor or provider. “Savings” includes elimination of items no longer being used, correction of taxes and surcharges, and billing platform changes. The future savings fee is billed in a lump sum at the completion of the 12-month period after the customer has realized the reductions.
3. If Client does not receive a refund, credit, or expense reduction there will be no fee for Company Services.

### Other Terms and Conditions

4. Client shall provide an executed Letter of Authority attached hereto as Exhibit A to permit Company to obtain records as necessary and to correct billing errors, remove improper charges, cancel unused services, and apply for credits and refunds on behalf of Client.
5. Client agrees it will not make any changes to utility services other than normal additions and deletions made in the ordinary course of business, nor will Client change contract terms or conditions with utility carriers until Company findings are complete.
6. Neither party shall disclose confidential information, including the terms or existence of this Forensic Utility Bill Audit Agreement, unless required by law, statute, or court order. Confidential Information means all information, including but not limited to oral, visual, electronic, or written, provided by either party (“Discloser” or “Disclosing Party”) to the other (“Recipient” or “Receiving Party”). Discloser’s Confidential Information includes

notes and other materials prepared by Recipient that incorporate any of the Discloser's Confidential Information and includes the existence of any business relationship between the Parties.

7. Client may terminate this Agreement by giving (insert our company name) 30 days advance written notice sent by certified mail. In the event of an early termination, Client will continue to pay (insert our company name) its fees based on any refunds, credits and/or reductions obtained pursuant to the terms of this Agreement as of the date of the written termination.
8. Client agrees to approve and sign any documents the vendor or provider may need or require in order to process claims and/or secure refunds, credits and reductions due to the Client.
9. All payments of fees are due within 30 days of being invoiced. Any payments made after the 30-day period shall be assessed a late payment charge of one- and one-half percent (1 ½%) per month or the highest legal amount, whichever is less.
10. If Client should default on any payment not being contested for a greater period than 30 days from the billing date, Company, at its discretion, may accelerate all payments due under this Agreement and seek recovery of the entire fee. All late payments shall incur the lesser of one- and one-half percent (1 1/2%) per month late payment penalty, or the highest amount allowed by law. If collection proceedings are required to recover audit fees earned herein, Client shall be responsible for collection costs including reasonable attorneys' fees.

Company:  
Authorization:  
Title:  
Date:

Company:  
Authorization:  
Title:  
Date: