



# UTILISAVE<sup>®</sup>

ELECTRIC • GAS • WATER & SEWER • STEAM • OIL • TELECOMMUNICATIONS

*Experts in*  
*Utility Bill Auditing &*  
*Cost Recovery Services*



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Bill Auditing &  
Cost Recovery Services*

**"An exhaustive study of utility bills reveals that misbilling and other billing abuses are commonplace and the cost for consumers and businesses is astronomical."**

— excerpt from analysis to be published by the Foundation for Taxpayer & Consumer Rights





## The UtiliSave® Philosophy

### *You're only as good as the people you hire*

UtiliSave team members combine sophisticated analytical skills with solid determination to identify and achieve your cost reduction goals.

UtiliSave, LLC has developed a unique niche in the utility bill auditing industry by assembling a truly incomparable team of industry experts – including former attorneys and high ranking utility and government officials, experienced auditors, analysts, engineers, an extensive MIS department, and a highly skilled support staff. UtiliSave team members combine sophisticated analytical skills with solid determination to identify and achieve your cost reduction goals.

Our collective intellectual capital – coupled with years of experience and the tenacious pursuit of new programs, tariff opportunities, and refunds – allows us to continuously outperform competitors. Since 1991, UtiliSave has amassed extraordinary expertise in identifying and developing proprietary issues enabling us to achieve optimum benefits for our clients.

### *Investments in superior technology yield superior results*

Using hands on analysis, property profiling and complex computer modeling programs specifically designed by our extensive MIS department, UtiliSave audits are geared to be the most thorough in the industry. We continually invest in the latest technology to better serve our clientele. Your utility accounts are reviewed through a highly advanced process, applying cutting edge technology and continuously updated proprietary programs, so that our professionals can uncover new issues and provide maximum returns.



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### ***Our relentless commitment to excellence***

If there is a benefit to a client, UtiliSave will do the utmost to capitalize on opportunities that will achieve a favorable result for you. Whether it means adding new specialized personnel, acquiring or developing new technology, or even overseeing litigation against a utility company, UtiliSave continues to develop the resources essential to successfully serve our clients.

A significant part of our strategy involves listening to our clients. That's why UtiliSave's commitment includes keeping an open dialogue with all our client contacts to assure their needs are being met.

UtiliSave values its long-term relationships, and our clients know that their accounts will be continuously reviewed throughout our relationship to reap the benefits of all applicable new issues.

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### **Mission Statement**

***"To aggressively seek,  
develop and implement  
sophisticated and  
innovative utility bill  
reduction opportunities for  
our clients by effectively  
employing advanced  
information technologies  
and our intellectual capital."***



## The UtiliSave® Solution

### ***Engage our experts to find out if you are entitled to significant refunds, savings and credits***

Outsourcing utility bill audits to UtiliSave enables companies to achieve their financial goals and focus on their core business...

Over 70% of all utility bills contain billing errors. When you consider that utilities generally represent the largest component of your operating expenses, these errors could amount to a very substantial figure. As the utility industry deregulates and more parties are involved in your utility service, the number of errors is likely to rise.

### ***Who can benefit from our services?***

Commercial, multifamily residential, industrial and institutional property owners and managers; business owners; companies that are moving or expanding, growing or downsizing; organizations with multiple sites; and real estate investors buying or selling buildings should engage UtiliSave. Our clients include some of the most prominent commercial and residential property owners and managers in the country, REITs, manufacturers, hospitals, universities, religious and not-for-profit organizations, charitable foundations, office buildings, cooperatives, condominiums, brokerage firms, financial institutions, and other large volume users of utilities.

### **Why Should You Outsource Your Utility Bill Audits?**

The in-house staffing and development of a comprehensive utility audit recovery process is simply not a cost-effective use of your valuable resources. Outsourcing allows your organization to bring a fresh perspective to your systems and procedures—in a financially realistic manner.

Outsourcing utility bill audits to UtiliSave enables companies to achieve their financial goals and focus on their core business while reaping benefits from utilizing the intellectual capital and resources of our experts. This spares our clients the excessive cost of inefficiently performing tedious, time-consuming, and staff-prohibitive projects in-house.

UtiliSave can supplement the work of internal auditors and internal cost recovery personnel. Our team will complement and successfully interface with facility, plant, engineering and telecom professionals to enhance their effectiveness, allowing them to concentrate on business at hand. The profitable results can benefit your utility budget, and your firm overall without investments in time, staff, and equipment.

## 3 Steps to Savings

### 1

You provide us with your signed and executed Auditing Agreement & Letters of Authorization (allowing us to interact with the utility companies), and a copy of your prior year's bills for each of your accounts.

### 2

We will implement our proprietary and proven audit techniques on your historical billing in search of recovery and savings opportunities.

### 3

Once errors are found, we will implement the necessary changes and process refunds due. We monitor the account to make certain all changes are executed and refunds or credits are issued to you.



There is no fee until results are obtained.

### *Capture unknown savings opportunities*

#### **Are you 100% certain your utility bills are correct?**

Are you on the right tariff? The utility companies' billing structures are based on highly complex rate schedules known as tariffs. If you are not on the right tariff, you may be overcharged. And, you may be entitled to recover any of these overcharges plus interest, for up to 6 years or possibly longer. Our experts will also analyze your accounts and determine whether you qualify for a more advantageous tariff going forward. Imagine the cumulative effect a UtiliSave audit could have on your bottom line.

#### *An unmatched level of professionalism yielding significant results*

We have proven time and time again, that our diligent, professional Electric, Gas, Water and Sewer, Steam, Oil and Telecommunications Audits lead to larger recoveries at the end of the day.

#### **Benefit from:**

- Highly creative multi-disciplined staff
- Tenacious efforts to implement new programs, tariffs, and refunds
- Minimal involvement on your behalf

**We handle everything from start to finish.**

Our clients include REITs, manufacturers, hospitals, universities, religious and not-for-profit organizations, charitable foundations, office buildings, cooperatives, condominiums, brokerage firms, financial institutions, and other large volume users of utilities.



## The UtiliSave® Audit Divisions

Our experts regularly find missed savings opportunities—even for clients who believe their bills are correct and for those who have had audits performed by other firms.



### **Electric • Gas • Steam • Oil**

Our industry experts will scrutinize your bills for errors and review the intricacies of the various tariffs to determine whether your accounts qualify for lower rates. We will work to recover any applicable funds retroactively as well as complete the necessary measures to put you on the most advantageous tariff going forward. UtiliSave will continue to monitor your accounts in the future—to confirm all changes have been implemented and identify new opportunities as they arise.

Deregulated utility purchases (where currently available) may provide unique opportunities for savings, but are not necessarily the best solution for everyone. There may be other pro-active opportunities to reduce your utility rates. Our professionals can advise you on the most suitable options and take you through the entire process, from preparing a Request For Proposal (RFP) to reviewing bids and selecting a provider. There are a lot of promises on the open market—and many traps for the unwary. UtiliSave can help ensure that you are getting the best deal.

In addition, once implemented, deregulated purchases may be more prone to billing errors than standard purchases from the regulated utility. Since you will likely receive two sets of bills in these instances—one from the seller of the commodity and one from the transportation provider—a greater number of entities will be handling the

data, and the likelihood of errors rises. A UtiliSave audit provides you the additional security against mistakes in billings for both your energy commodity and transportation bills.

### **Water & Sewer**



Leaks are not the only cause of high water bills. UtiliSave's sophisticated process identifies savings opportunities from both municipal and private water companies.

Annual water and wastewater rates and charges have been exceeding the rate of inflation for the past 15 years. As a result of this steady upward spiral, these charges are currently exceeding the cost of other utilities in many locations, and the future holds no promise for relief. Stricter federal regulations guarantee predictable increases (and, in some localities, double-digit increases) of water and sewer costs well into the first decade of the next millennium.

Exacerbating the problem of higher costs, is the fact that many of the largest water/sewer providers are understaffed, unresponsive, bureaucratic agencies—rarely attentive to customer complaints and issues. These entities are not overseen by Public Service Commissions or similar watchdog agencies, and often operate with policies that are either unpublished or buried in voluminous, highly technical regulations. UtiliSave's expert team, led by former senior level water utility managers, has earned a

reputation for leaving no stone unturned as they skillfully cut through the red tape and confirm the accuracy of all charges, allowances, surcharges, and meter output information. They strive to ensure that clients' rates are the lowest possible and that they receive all refunds, allowances, rebates, and credits due.

Historically, water charges have received the least focus with regard to their potential for funds due from billing errors but with the current state of the industry, they are well worth investigating. UtiliSave's professionals can uncover the hidden assets within these bills and make certain you are paying no more than necessary.

### **Telecommunications**

Nearly 85% of all telephone bills contain errors. Finding these hidden errors could have a significant impact on your company's bottom line. UtiliSave specializes in auditing business telecommunications accounts to reduce your monthly expenses and recoup refunds to which your company may be entitled. We can help you improve your operating efficiency and maximize your company's profits and value.

Uncovering mistakes is just the first step to obtaining refunds and lowering future bills. Our staff is comprised of former utility executives and attorneys, analysts, technicians, engineers and experts on the codes, rules, regulations, and tariffs that govern the industry. We will work in tandem

with your telecommunications department to determine the accuracy of your firm's bills to identify and eliminate overcharges, and to reduce your basic monthly charges without changes in service or equipment. We do all the necessary work to secure refunds from telephone company discrepancies and billing errors.

[Use any or all of UtiliSave's expert audit services.](#)  
[Let us recover significant billing refunds, credits, and savings due your organization.](#)



Telephone companies incorporate very elaborate rate systems with varying billing programs and embedded costs. These systems are complicated and confusing to those unfamiliar with the nuances of telephone tariffs. Besides billing errors, there may be mistakes with regard to service, equipment or usage charges. Some of the areas UtiliSave analyzes include mileage charges, message unit billings, long distance toll charges, surcharges, taxes and FCC charges, class of services and tariff options, to name but a few.

With our advanced information technology, we have recouped millions of dollars for a variety of organizations that are large consumers of telecommunication services. Our team has experience auditing accounts for some of the nation's largest hospitals, universities, banks, and brokerage firms. UtiliSave's experts can help you navigate the rapidly changing market, capitalize on new opportunities, and implement creative solutions, thereby yielding significant savings for your organization.

You, the Future...and UtiliSave®

**New services to  
meet our clients' needs**

We are constantly broadening our services to develop and enhance our clientele's utility cost management programs.

**UtiliSave Interactive**

UtiliSave Interactive (*now on our web site, [www.utilisave.com](http://www.utilisave.com)*) was developed by UtiliSave's MIS professionals who incorporated the best capabilities of popular energy management systems to give clients full access to their historical and current utility account information. With just a click of the mouse, UtiliSave Interactive provides you with historical account data vital for monitoring and tracking your utility usage, as well as preparing you for deregulated utility purchases. All client

information is password protected to ensure confidentiality. Visit our web site for a demo of this powerful new technology.

**The Utility Exchange**

We are developing a national network to provide you will all the information you need to obtain the most competitive prices on deregulated utilities, keep you informed of the latest industry news and issues. We want to make certain that you are paying the lowest rates possible for your utility purchases.



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