
Renew Financial Contractor Marketing Guidelines



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Overview

Renew Financial's PACE financing makes home improvements affordable for millions of homeowners and helps home improvement contractors grow their businesses and serve more customers.

Renew Financial Registered Contractors and others have the benefit of co-marketing our PACE financing and using Renew Financial text and images in their co-marketing materials. These Marketing Guidelines lay out how the Renew Financial name and logo can be used as well as approved text and images that you can include in your materials. All marketing or advertising materials that include Renew Financial, RenewPACE, or CaliforniaFIRST must follow these Marketing Guidelines.

Acceptable Uses

All materials that include Renew Financial, RenewPACE, or CaliforniaFIRST must meet 1 of the 3 following requirements:

- Use Renew Financial pre-designed materials with no changes
- Use Renew Financial pre-designed materials and add a contractor's logo and contact information where designated with no other content added and no changes to any other part of the materials
- Any collateral containing the names Renew Financial, RenewPACE, or CaliforniaFIRST must be approved by the Renew Financial marketing team in advance

Please email materials in final PDF or JPG form to marketing@renewfinancial.com for approval; we will respond via email within 3 business days.

Representing the Public Trust

Renew's PACE programs are offered in cooperation with local city and county governments. Cities and counties enable our PACE financing to help meet environmental and conservation goals and to help their residents update and improve the energy efficiency of their homes. It is essential that city and county interests are considered alongside your business goals to ensure that Renew's PACE financing is supported within the communities. With every project installed, we aim to help communities lower their energy and water consumption, reduce their carbon footprint, and create a more energy-efficient future.

No Misleading Messaging

Clear, informative, truthful, and transparent communications are essential for co-marketing Renew's PACE financing. Any communications, acts, or practices that mislead homeowners are disallowed and are grounds for suspension or termination from the program.

Prohibited Practices

The following practices are strictly prohibited:

- ❌ Language or graphics that imply that Renew Financial, RenewPACE, CaliforniaFIRST, or PACE financing results in free, no payment, limited payment, or deferred payment.
- ❌ Language or graphics that imply that any government entity financially backs or guarantees the financing or the program.
- ❌ Language or graphics that state or imply that your company is affiliated with or endorsed by a public agency, city, county, or state.
- ❌ Language or graphics that imply the marketing materials have been sent or authorized by a public agency, city, county, or state.
- ❌ Using public agency, city, county, or state logos, seals, or images or graphics that could be interpreted by a customer to be a public agency, city, county, or state logo.
- ❌ Unfair, deceptive, abusive, and/or misleading communications.
- ❌ Any practice that violates applicable laws or regulations.
- ❌ Statements that misrepresent the PACE program.
- ❌ Statements to consumers regarding the impact PACE financing may have on their taxes.

(Continued on next page)

Prohibited Practices (cont.)

- ✗ Making statements to consumers that PACE will save them money or increase the value of their homes.
- ✗ The use of false checks or vouchers.

This list is not exhaustive. Practices not explicitly spelled out here may still be prohibited and grounds for termination. Thank you for reading these Marketing Guidelines carefully and keeping them on hand as a reference to support your marketing and outreach efforts.

If you have any question about these requirements, we're always here to help and answer questions. Contact us at marketing@renewfinancial.com or reach out to your Renew Financial sales representative.

Approved Language

Everyone communicating to consumers in any way (i.e. advertisements, press releases, canvassing) must be clear and accurate in how you describe Renew's PACE financing and its benefits. The text in green boxes below may be used in marketing and advertising materials **as long as it is used exactly as it is with no modifications**. If you modify the text in any way, the materials will be subject to pre-approval by the Renew Financial marketing team.

Renew Financial

Renew Financial is the company that provides CaliforniaFIRST and RenewPACE financing. Always write it as follows: Renew Financial — two words, with both the "R" in Renew and the "F" in Financial always capitalized and all other letters lower case.

Describing Renew Financial's PACE Financing

When including Renew's PACE financing in your materials and communications, please describe it using the following language (copy and paste from the box below):

Renew Financial offers simple financing for home improvement projects. With Renew's PACE financing, you can make your home more comfortable, safe, healthy, and energy efficient with no upfront cost and then repay as a line item on your property tax bill. For more than a decade, homeowners have trusted Renew Financial to help them afford to make critical home improvements with ease.

Relationship Disclosure

Do not state or imply that Renew Financial is a part of a contractor's company or that any contractor is a part of Renew Financial.

The following disclosure language must appear on all contractor advertising and on all Contractor web pages where Renew's PACE financing is mentioned (copy and paste from the box below). This language must be legible to the average reader and must appear in a font size no smaller than 10 pt:

(CONTRACTOR) is an independent company and is not owned or controlled, in whole or part, by Renew Financial Group LLC. (CONTRACTOR) does not provide financing and is neither a lender nor a broker. Renew's PACE financing is provided by energy finance leader Renew Financial Group LLC in cooperation with local governments sponsors, and financing approvals are subject to underwriting and documentation requirements.

Clear & Correct Language

It is crucial to consistently use correct language when describing the details of our program. Using misleading verbiage or claims may confuse customers and leave you and Renew Financial open to liability.

Guidelines for Logo Usage

The following standards must be followed wherever the Renew Financial logo appears.

The Renew Financial logo should always appear in a consistent manner, utilizing proper layout and colors as specified in these guidelines. It should be displayed clearly and independent of other elements. This version of the logo must always be used. No other versions of the Renew Financial logo may be used. The logo may not be recreated from type.



[Download logo files here](#)

Clear Space (Isolation Zone)

The Renew Financial logo should be surrounded by ample space and kept clear of other elements. The “isolation zone” around the logo is determined by the height of one line of type as indicated in the figure below.

Any other elements used should be placed outside of the isolation zone and far enough away, so that they appear independent. No other elements should appear, in full or in part, within this isolation zone.



The free space around the logo must constrain to the proportions indicated by the value X, which is the same height as the leaf in the logotype.

Minimum Logo Size

The Renew Financial logo should always be presented at a size that is easily readable. The size of the logo is not to fall below the size shown here: with the logo lock-up no smaller than 3/8 inch in height, (width must be kept proportional).



Prohibited Alterations

The Renew Financial logo should always be displayed in correct, consistent form whenever used. This is vital to the brand identity and its recognition in the community. Alterations to the logo are strictly prohibited. Use the specific logo files provided to ensure that they are displayed in correct form.



DO NOT change the color of the logotype



DO NOT distort the logotype when scaling



change the font of the logotype



DO NOT change the size or position of the leaf



DO NOT add special effects to the logotype



DO NOT use the leaf without the logotype

File Format Description & Usage

File formats can affect the quality of an image, so it is important to use the right one. With so many applications and file formats available, it can be difficult to decipher what format to use for a specific application. Below are preferred formats that will aid in choosing the correct logo file format to provide optimal quality. Always use the correct file format for your application.

Preferred Formats

PRINT APPLICATIONS – For any professional print job, always use an Adobe Illustrator .eps. For internal printing, a .jpg or .tif can be used instead. Never take a graphic off of the web for use in print materials.

SCREEN APPLICATIONS – A transparent .png is the optimal format for screen applications. A .jpg or .gif can be used as well, but are older formats that do not always produce consistent results.

ENVIRONMENTAL APPLICATIONS (signage, billboards, etc.) – All environmental applications require an Illustrator .eps file format.

Advertising Guidelines

You may make reference to the fact that you offer Renew's PACE financing and are a Renew Financial Registered Contractor in your advertising as long as you follow all guidelines in this document. Advertising that includes anything outside the approved language provided earlier in these guidelines must be reviewed and approved in advance by Renew Financial's marketing team. Please submit materials for review to marketing@renewfinancial.com and allow at least 3 business days for review.

Advance Approval

You must submit and receive approval for any marketing materials you create that use the Renew Financial logo or mention Renew Financial, RenewPACE, or CaliforniaFIRST before the materials are made public. Please submit materials to marketing@renewfinancial.com and allow at least 3 business days for review.

Renew Financial reserves the right to reject any marketing materials mentioning the Renew Financial brand or program details that are inconsistent with these guidelines. If said use is rejected, contractor agrees to immediately cease its use of the marketing materials in question or to remove any mention of Renew Financial or its financing products from said marketing materials.

Clear Attribution

Any marketing piece you create mentioning Renew Financial and its financing must clearly look like it is coming from you, the contractor, and not from Renew Financial or any of its programs or brands.



Disclosure Language

Relationship disclosure language (defined on page 5 of this document) must be present on advertisements and marketing materials that contain references to Renew Financial financing, its logo, or its assets.

Logo Placement in Materials

Your logo must be more prominent (and generally larger) than the Renew Financial logo and your contact information must be included on the piece.



Naming & Brand Confusion

Please do not create company, service, or product names that are similar to, and could be confused with, Renew Financial.



Online Naming Conventions

You may not use the names Renew Financial, RenewPACE, or CaliforniaFIRST as part of any URL, email address, or social media handle.

- ✗ www.CaliforniaFIRSTContractor.com
- ✗ RenewPACEContractor@yourbusiness.com
- ✗ [@CaliforniaFIRST_1](#)

Creating Digital Links

On any digital materials, the Renew Financial logo image and any other images provided by Renew Financial may be linked to direct to renewfinancial.com but must not link to a non-Renew Financial web page.

Online Advertising

Online ads may mention that your company offers Renew Financial financing but should not include the Renew Financial logo to avoid confusion.

Direct Mail

Direct Mail must clearly look like it comes from your company and must follow all guidelines in this document.

Direct mail pieces may not appear to be from any local or state government or from Renew Financial or any of its affiliated programs or brands.

No Fake Check Designs

No “fake check” designs; Renew Financial does not send checks to homeowners, so it misrepresents the program to show a homeowner a fake check from Renew Financial or from you, the contractor.

Radio, TV, Streaming Video

Contractors may describe Renew Financial using the approved copy listed in the Approved Language section. Written scripts must be pre-approved by the Renew Financial Marketing team before broadcast production occurs, and the final produced ads must be approved by the Renew Financial Marketing team before airing.

Oral Representations – Canvassing, Phone Calls, Telemarketing

Any oral representations of Renew Financial must be pre-approved by the Renew Financial Marketing team.

Telemarketing calls must comply with all applicable state and federal law, including the Telephone Consumer Protection Act and must abide by all applicable “Do Not Call Registries” and any “Do Not Call Numbers.”

Apparel

Contractors may not use the Renew Financial, RenewPACE, or CaliforniaFIRST logos or any variations thereof on any apparel unless ordering approved co-branded apparel from the Renew Financial Marketing Hub.

Social Media Posts

You may not use Renew Financial, RenewPACE, CaliforniaFIRST or any derivative of these names in the title of any social media channel. Content about Renew Financial should reflect how Renew Financial has had a positive effect on your customers, your business, and the community.

Any social media content you post must make clear that you are your own company and be clear that your affiliation with Renew Financial is as a Registered Contractor. You are welcome to retweet or share applicable content from our social media channels using the appropriate social media platform share functions:



Facebook: facebook.com/renewfinancial



Twitter: [@RenewFinancial](https://twitter.com/RenewFinancial)



LinkedIn: linkedin.com/company/renewable-funding-llc

Third Parties

Contractors will be held responsible for all materials and communications produced on their behalf by their agencies and partners. Please share this guide with any partners who create or disseminate materials on your behalf and ensure they follow it, including Renew Financial pre-approval of language and materials as required by these guidelines.

Press Releases & Communicating with the Media

All press releases that include Renew Financial, RenewPACE, or CaliforniaFIRST in any way must be pre-approved by Renew Financial's marketing team.

When communicating with the media, you may not:

- ❌ Represent yourself as a representative of Renew Financial or any related government entity that is part of the public/private partnership.
- ❌ Reference yourself, or your employees, as employees of Renew Financial or any related government entity that is part of the public/private partnership.

Renew Financial Marketing Hub

Visit our Marketing Hub at rfmarketinghub.com to order pre-printed and custom co-branded Renew Financial marketing materials.

Our Marketing Hub makes it easy for you to run a direct mail or canvassing campaign with pre-approved artwork with space to include contractor logo and contact information; have the best booth at a home show with posters, banners, and promotional goods; or stock up on the key materials you need to use Renew's PACE financing to close deals.

To request an account on the Marketing Hub, email support@rfmarketinghub.com and include your name and your business name.

Violation of Marketing Guidelines or Program Requirements

Failure to comply with all branding and marketing guidelines may result in consequences including, but not limited to, removal from any future participation in Renew Financial's financial products, including RenewPACE and CaliforniaFIRST, reporting to regulatory authority, legal action.

Need Support?

If you have any questions about our materials, how to use the materials provided, or what you can and can't do in your co-branded marketing, don't hesitate to contact your Renew Financial sales support representative or email marketing@renewfinancial.com.

