

## ATTACHMENT A

### MANAGERIAL LICENSING QUALIFICATIONS [Section 454.60]

Applicant meets the managerial qualifications set forth in Part 454.60, as demonstrated in Attachment **A**. Attachment **A** includes an exhibit containing a corporate organizational chart and identifying the persons who are being used to meet the requirements of Part 454.60(a). Attachment **A** includes an exhibit containing occupational background information on the person or persons who are being used to meet the requirements of Part 454.60(a).

#### **Managers and Qualifications**

**Caleb McDaniel** – Manager

Oct 2007 - June 2010 – Office Manager, Bryan Exhaust Service, Inc.

Dec 2010 - May 2013 - Regional manager of a chain of secondhand dealer stores (precious metals) in Austin, TX. Responsible for hiring, training, sales managing, reporting, security, handling finance, and compliance with all laws.

**Edward Bryan** – Investor and marketing consultant

July 1956 - Oct1977: Various jobs including nurseryman, various sales jobs, construction, grinding bi-focal lenses, foundry research, aircraft instrument calibration, waiter and boat fiber glassing

Oct1977 – Feb 2010: Owned and operated Bryan Exhaust Service, Inc. Starting the company from nothing and built it to \$2.7Million annual revenue at time of sale. Currently am an investor and consulting on marketing and sales for Utility Services Advisory Group.

**John B McDaniel** - Operations Manager:

June 1976 - June 1980 Medical Manufacturing Rep. Sold med. supplies factory direct to doctors and hospitals in the Mid-Atlantic States.

June 1980 - Jan 1989 Manager, Power Insurance - a large brokerage in Southern California.

Jan 1989 - Dec 1999 Manager, LDS – large long distance co selling residential and commercial services.

Jan 2000 - Jan 2010 Manager, MAS - mortgage modification business.

Dec 2009 - May 2013 My Gold & Silver Store - Manager of large gold and silver buying business.

May 2013 - current. Operations Manager, Utility Services Advisory Group

**Elizabeth Currier** - CFO

Midland College, Midland, Texas - Associate Degree in Accounting and Information Systems

Apr 1985 - Jan 1989 – CFO Power Insurance. Start up, management, then sold largest substandard auto insurance brokerage in Los Angeles.

April 1990 - June 1998 – SVP Operations Long Distance Services. Oversaw operations and finance.

Start-up, management, then sold to Star Telecom after client base grew to 150,000 customers.

Jan 2001 - Apr 2002 - CFO Wireless WebConnect, a publicly held Wireless Internet Co. (25,000 customers)

May 2002 - Mar 2003 - Cost Redux – a cost consulting firm. Start up and management.

Mar 2003 - current – CFO Doc Hunters. A national title research company. Start up and management.

April 2008 - April 2010 – CFO Accurate Group Clearwater. A national real estate title services operation.

Dec 2009 - May 2013 - Co-founder CFO, GSP Trading - chain of precious metal secondhand stores.

**Mike Campbell** – Administration Manager

Jan 1974-Oct 1984 - Family and personal counselor.

Oct 1984–Sept 1990 - Executive Director Local Church

Oct 1990–April1993 – Business Consulting focused on medical practices.

April 1993–Dec 1994 - Sales Mgr Phoenix Network, a B2B long distance company in Santa Clara, CA

Jan 1995-July 2000 –Co-founder, COO Business Tel, a customer acquisition company turned broadband wireless Internet Service Provider started in San Jose, CA, then relocated to Clearwater, Florida in 2000.  
Aug 2000-April 2002 SVP Administration and Board Member, Wireless WebConnect. (Business Tel brought public.) strategic alliances, HR, Legal, PR, marketing, new product implementation  
May 2002-Mar 2003 VP - Cost Redux – a cost consulting firm. Start-up and management.  
Mar 2003-current – VP Doc Hunters. A national title research company. Start up and management.  
April 2008-April 2010 – Manager Accurate Group Clearwater. A national real estate title services operation.  
Dec 2009-May 2013 – Co-founder VP, GSP Trading - chain of precious metal secondhand dealer stores.

USAG basic organizational chart showing what the applicant and managers oversee.



## Attachment B

1. Applicant meets the technical qualifications set forth in Part 454.70, as demonstrated in Attachment **B**. Attachment **B** includes an exhibit containing occupational background information on the person or persons who are being used to meet the requirements of Part 454.70(a)

Part 454.70(a) states: (a) An applicant shall be deemed to possess sufficient technical capabilities to provide agency, brokering or consulting services if the applicant can demonstrate that it has had experience in the electric industry of at least one year.

Our technical capabilities relate to our internal office operations and managing the relations with our electrical suppliers in order to operate as an agency which we have been doing for at least one year. Included in our technical capabilities are the management of business development, finance, legal, personnel, marketing, training, production and quality control.

### **Personnel and Qualifications**

**Caleb McDaniel – Manager**

Oct 2007 - June 2010 – Office Manager, Bryan Exhaust Service, Inc.

Dec 2010 - May 2013 - Regional manager of a chain of secondhand dealer stores (precious metals) in Austin, TX. Responsible for hiring, training, sales managing, reporting, security, handling finance, and compliance with all laws.

Utility Services Advisory Group - April 2013 to current. Member of executive planning committee.

**Edward Bryan – Investor and marketing consultant**

July 1956 - Oct1977: Various jobs including nurseryman, various sales jobs, construction, grinding bifocal lenses, foundry research, aircraft instrument calibration, waiter and boat fiber glassing

Oct1977 – Feb 2010: Owned and operated Bryan Exhaust Service, Inc. Starting the company from nothing and built it to \$2.7Million annual revenue at time of sale. Currently am an investor and consulting on marketing and sales for Utility Services Advisory Group.

Utility Services Advisory Group - April 2013 to current. Business consultant and investor.

**John B McDaniel - Operations Manager:**

June 1976 - June 1980 Medical Manufacturing Rep. Sold med. supplies factory direct to doctors and hospitals in the Mid-Atlantic States.

June 1980 - Jan 1989 Manager, Power Insurance - a large brokerage in Southern California.

Jan 1989 - Dec 1999 Manager, LDS – large long distance co selling residential and commercial services.

Jan 2000 - Jan 2010 Manager, MAS - mortgage modification business.

Dec 2009 - May 2013 My Gold & Silver Store - Manager of large gold and silver buying business.

May 2013 - current. Operations Manager, Utility Services Advisory Group

Utility Services Advisory Group - April 2013 to current. Runs the day to day operations. Managing personnel, marketing, sales, quality control and developing relationships with new suppliers. Member of executive planning committee

**Elizabeth Currier - CFO**

Midland College, Midland, Texas - Associate Degree in Accounting and Information Systems

Apr 1985 - Jan 1989 – CFO Power Insurance. Start up, management, then sold largest substandard auto insurance brokerage in Los Angeles.

April 1990 - June 1998 – SVP Operations Long Distance Services. Oversaw operations and finance.

Start-up, management, then sold to Star Telecom after client base grew to 150,000 customers.

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April 2008 - April 2010 – CFO Accurate Group Clearwater. A national real estate title services operation.  
Dec 2009 - May 2013 - Co-founder CFO, GSP Trading - chain of precious metal secondhand stores.  
stores.  
Utility Services Advisory Group - July 2013 to current. Manages finance and member of executive planning committee.

**Mike Campbell** – Administration Manager

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Oct 1984–Sept 1990 - Executive Director Local Church  
Oct 1990-April1993 – Business Consulting focused on medical practices.  
April 1993–Dec 1994 - Sales Mgr Phoenix Network, a B2B long distance company in Santa Clara, CA  
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April 2008-April 2010 – Manager Accurate Group Clearwater. A national real estate title services operation.  
Dec 2009-May 2013 – Co-founder VP, GSP Trading - chain of precious metal secondhand dealer stores.  
Utility Services Advisory Group - July 2013 to current. Manages legal, marketing and member or exec committee.

Since April 2014 we have established relationships with and sold for several suppliers, including:

Over the past year, as a small operation, we have signed up over 2000 residential clients and over 400 commercial clients for various suppliers including: Direct Energy, Public Power, Champion, APG&E, Constellation, Eligo and EnergyMe.

The states we have marketed and sold in include NY, NJ, OH, PA and we would like to sell in IL.



## CHANGE RIDER

To be attached to and form a part of Bond No. 2217034  
dated MAY 1, 2014, in the amount of \$5,000.00

executed  
by EDWARD P. BRYAN as Principal,  
and **GREAT AMERICAN INSURANCE COMPANY**, as Surety, and in favor of  
THE PEOPLE OF THE STATE OF ILLINOIS as Obligee.

It is agreed that the following changes be made in the attached bond:

AMEND BUSINESS NAME:  
FROM- EDWARD P. BRYAN  
TO- UTILITY SERVICES ADVISORY GROUP, LLC

Effective: NOVEMBER 6, 2014

Provided, however, that the attached bond as changed by this Rider shall be subject to all its agreements, conditions and limitations, and that the liability of the Surety under the attached bond and under the attached bond as changed by this Rider shall not be cumulative.

SIGNED AND SEALED ON THIS 6TH DAY OF NOVEMBER, 2014

GREAT AMERICAN INSURANCE COMPANY-

By: Valerie Aber  
VALERIE ABER, Attorney-in-Fact

License or Permit Bond

License or Permit Bond No 2217034  
GREAT AMERICAN INSURANCE COMPANY  
201 EAST 4TH STREET, CINCINNATI OH 45202

KNOW ALL MEN BY THESE PRESENTS, That we, **Edward P. Bryan** as Principal, and **GREAT AMERICAN INSURANCE COMPANY** a **OHIO** Corporation, and authorized to do business in Illinois, as Surety, are held and firmly bound unto THE PEOPLE OF THE STATE OF ILLINOIS as Obligee, in the sum of FIVE THOUSAND AND NO/100 Dollars (\$5,000.00), for which sum, we bind ourselves, our heirs, executors, administrators, successors and assigns, jointly and severally, by these presents.

THE CONDITIONS OF THIS OBLIGATION ARE SUCH, That WHEREAS, the Principal has been or is about to be granted a license or permit to do business to operate as an ABC (Agent, Broker, or Consultant) under 220 ILCS 5/16-115C and is required to execute this bond under 83 Illinois Administrative Code Part 454.80 by the Obligee.

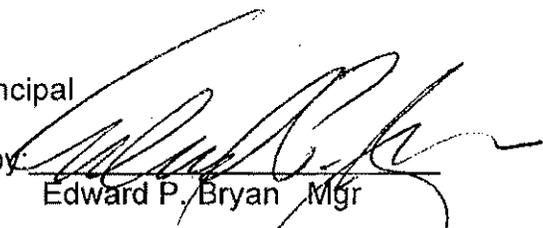
NOW, Therefore, if the Principal fully and faithfully perform all duties and obligations of the Principal as an ABC, then this obligation to be void; otherwise to remain in full force and effect.

This bond may be terminated as to future acts of the Principal upon thirty (30) days written notice by the Surety; said notice to be sent to 527 East Capitol Avenue, Springfield, Illinois 62701, of the aforesaid State of Illinois, by certified mail.

Dated this 1 day of APRIL, 2014

Edward P. Bryan

Principal

by: 

Edward P. Bryan Mgr

Great American Insurance Company

Surety

by: 

Valerie Aber, Attorney-In-Fact



**GREAT AMERICAN INSURANCE COMPANY®**

Administrative Office: 301 E 4TH STREET • CINCINNATI, OHIO 45202 • 513-369-5000 • FAX 513-723-2740

The number of persons authorized by this Power of Attorney is not more than one

Bond No. 2217034

**POWER OF ATTORNEY**

**KNOW ALL MEN BY THESE PRESENTS:** That the GREAT AMERICAN INSURANCE COMPANY, a corporation organized and existing under and by virtue of the laws of the State of Ohio, does hereby nominate, constitute and appoint the person or persons named below its true and lawful attorney-in-fact, for it and in its name, place and stead to execute on behalf of the said Company, as surety, the specific bond, undertaking or contract of suretyship referenced herein; provided that the liability of the said Company on any such bond, undertaking or contract of suretyship executed under this authority shall not exceed the limit stated below. The bond number on this Power of Attorney must match the bond number on the bond to which it is attached or it is invalid.

Name	Address	Limit of Power
Valerie Aber	2424 W Missouri Ave Phoenix, AZ 85015-2203	\$ 5,000.00

IN WITNESS WHEREOF the GREAT AMERICAN INSURANCE COMPANY has caused these presents to be signed and attested by its appropriate officers and its corporate seal hereto affixed this 6 day of NOVEMBER 2014  
Attest: GREAT AMERICAN INSURANCE COMPANY



*Atty L. C. B.*  
Assistant Secretary

*David C. Kitchin*  
Divisional Senior Vice President  
DAVID C. KITCHIN (513-377-1405)

STATE OF OHIO, COUNTY OF HAMILTON • ss:

On this 6 day of NOVEMBER 2014, before me personally appeared DAVID C. KITCHIN, to me known, being duly sworn, deposes and says that he resides in Cincinnati, Ohio, that he is a Divisional Senior Vice President of the Bond Division of Great American Insurance Company, the Company described in and which executed the above instrument; that he knows the seal of the said Company; that the seal affixed to the said instrument is such corporate seal, that it was so affixed by authority of his office under the By-Laws of said Company, and that he signed his name thereto by his authority.



KAREN L. GROSHEIM  
NOTARY PUBLIC, STATE OF OHIO  
MY COMMISSION EXPIRES 02-20-16

*Karen L. Groshiem*

This Power of Attorney is granted by authority of the following resolutions adopted by the Board of Directors of Great American Insurance Company by unanimous written consent dated June 9, 2008.

**RESOLVED:** That the Divisional President, the several Divisional Senior Vice Presidents, Divisional Vice Presidents and Divisional Assistant Vice Presidents, or any one of them, be and hereby is authorized, from time to time, to appoint one or more Attorneys-In-Fact to execute on behalf of the Company, as surety, any and all bonds, undertakings and contracts of suretyship, or other written obligations in the nature thereof; to prescribe their respective duties and the respective limits of their authority; and to revoke any such appointment at any time.

**RESOLVED FURTHER:** That the Company seal and the signature of any of the aforesaid officers and any Secretary or Assistant Secretary of the Company may be affixed by facsimile to any power of attorney or certificate of either given for the execution of any bond, undertaking, contract of suretyship, or other written obligations in the nature thereof, such signature and seal when so used being hereby adopted by the Company as the original signature of such officer and the original seal of the Company; to be valid and binding upon the Company with the same force and effect as though manually affixed.

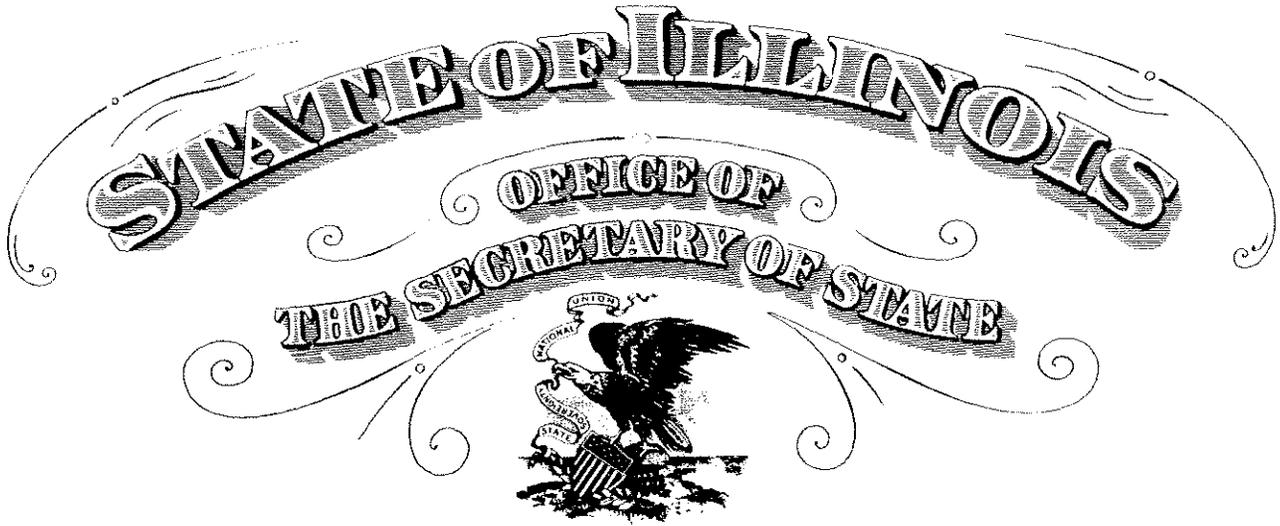
**CERTIFICATION**

I, STEPHEN C. BERAHA, Assistant Secretary of Great American Insurance Company, do hereby certify that the foregoing Power of Attorney and the Resolutions of the Board of Directors of June 9, 2008 have not been revoked and are now in full force and effect.

Signed and sealed this 6 day of NOVEMBER 2014



*Atty L. C. B.*  
Assistant Secretary



*To all to whom these Presents Shall Come, Greeting:*

*I, Jesse White, Secretary of State of the State of Illinois, do hereby certify that*

UTILITY SERVICES ADVISORY GROUP, LLC, A FLORIDA LIMITED LIABILITY COMPANY HAVING OBTAINED ADMISSION TO TRANACT BUSINESS IN ILLINOIS ON AUGUST 12, 2014, APPEARS TO HAVE COMPLIED WITH ALL PROVISIONS OF THE LIMITED LIABILITY COMPANY ACT OF THIS STATE, AND AS OF THIS DATE IS IN GOOD STANDING AS A FOREIGN LIMITED LIABILITY COMPANY ADMITTED TO TRANACT BUSINESS IN THE STATE OF ILLINOIS.



*In Testimony Whereof, I hereto set my hand and cause to be affixed the Great Seal of the State of Illinois, this 3RD day of SEPTEMBER A.D. 2014 .*

*Jesse White*

Authentication #: 1424602930

Authenticate at: <http://www.cyberdriveillinois.com>

SECRETARY OF STATE