



SEATTLE, WASHINGTON

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**Q Describe your firm, its offerings and its mission.**

GreenBalance Energy Marketing, LLC, a boutique alternative investment strategy company, was founded in 2010 to mobilize private sector capital in order to fund renewable energy projects to meet climate goals through crafted alternative investment strategies. Our firm applies combined 30+ years experience in Renewable Energy financing and investments to offer unique strategies enabling retail investors to capture a return based on Federal Cash Grants and various tax incentives in Renewable Energy projects. We offer strategies that are tax-benefitted (reduction/deferral of federal tax liabilities) and predictable income streams that are contract-based without correlation to market performance. We strive to achieve climate goals by successfully funding projects while rewarding investors.

**Q Describe your investment strategy and how it might be unique.**

Renewable Energy investments are unique in that a significant percentage of the return is paid by the Federal Government in the form of accelerated depreciation and Tax Credits or Cash Grants. Unlike traditional strategies, this enables passive activity loss investors to increase cash returns by leveraging their current-year tax obligations. This “new asset class” provides the investor predictable cash returns based on long-term Power Purchase and Equipment Lease Agreements and has no correlation to market performance. The strategy offers income solutions as well as tax efficiency while achieving reduction of overall portfolio risks. It is socially responsible and will provide investors with new ways to invest in “green opportunities.”

**Q Describe how your investment products fit into a well-rounded asset allocation strategy.**

The market crisis of 2008 caused investors to pay much closer attention to risk management. Investors are favoring predictable forms of cash flow while seeking protection against market

volatilities. Well-rounded asset allocation requires investment in well diversified asset classes. Our strategy fits well as it has no correlation to other asset classes, which is critical for the management of risk/return profile of a well diversified portfolio. Our strategy delivers predictable stream of cash returns that are based on Renewable Energy Federal Cash Grant, long-term Power Purchase Agreement and reduction/deferral of federal tax/AMT liabilities by utilizing various tax incentives in Renewable Energy projects for qualified investors.

**Q How has your firm adapted during the recent economic downturn?**

The recent economic slowdown highlighted the need for investments which can offer predictable cash flow while seeking protection against market volatilities from both investors and financial professionals. The US government initiated various tax incentives to stimulate our economy, however, tightening of the credit market made it difficult for federal incentives to be utilized. Our firm, combining financial, tax and project financing expertise offer strategies that capitalize federal incentives to provide solutions to qualified retail investors, financial professionals and projects to meet their needs and objectives. Capitalization of federal incentives is the key to stimulate our economy, as well as getting closer to our climate goals.

## AT A GLANCE

**Firm Name:** GreenBalance Energy Marketing, LLC

**Principal:** Kazumi Tait

**Employees:** 5

**Location:** Seattle, WA

**Years in Business:** since 2010

**Minimum Investment:** \$500,000