

## MEMBERSHIP APPLICATION CHECKLIST

### 1. Enrollment Process (Pre-Application)

- Enrollment Form (first step to initiate the process)
- State Documentation (uploaded at the time of submittal of the enrollment form)
- Secretary Certificate (needed to provide to access the application)
- Officer, Authorized Representative, Maintenance Manager Designation Forms (needed to provide access to application)

### 2. Signature Documents Forms (Not All Inclusive)

- W9
- Officer Certification
- Standard Form of Agreement (Scheduled 4)
- Application for Membership
- CAM Form A/B (PJM tool access)
- Market Participant Application (questions on how you intend to participate in PJM)

### 3. Application Processing and Timeline

- Please note the above list is not exhaustive and additional information may be required
- Applications will not be processed until the appropriate fees are collected (these fees will be communicated to you based on your application). A list of fees can be found on [PJM.com](http://PJM.com).
- All applications require a membership and credit approval process which includes background checks.
- All applications may take up to **90 days** to process once all information is submitted for review.

### Online Membership Application Process/Forms (Not All-Inclusive)\*

- Affiliate Disclosure (Affiliated companies to applicant)
- Credit Application
  - Letter of Credit or Guaranty (if applicable; must meet PJM requirements)
  - Bank and Trade References
  - LLC Agreement (or similar)
  - Offering Memo (if applicable)
  - Risk Management Policies and Procedures
  - Company Principals (Top 5)
    - First Name
    - Last Name
    - Title
    - Business Address
    - Principal previous companies where a role of Principal was held
    - Principal Date of Birth
  - Form 10-K and any amendments or equivalent financial statements if private company
  - Quarterly reports on Form 10-Q and any amendments or equivalent financial statements if private company
  - Form 8-K, if any, since last 10-K
- Credit Contacts
- Sector Selection (Sector for which your companies applies)

*Please note that the 90 day clock does not start until all the above documents have been received. Upon receipt of the above documentation (and any other required information needed to process the application) and applicable fees - the application will be processed within 90 days.*



**\*For more information or questions contact: [membershipforms@pjm.com](mailto:membershipforms@pjm.com)**