

Company Profile



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Who We Are

We're an independent service provider in the Renewable Energy Industry - serving Owners, Equipment Manufacturers & Contractors.

Our Mission

Optiv's mission is to build a great company, treat people well, and do quality work for our customers. Our goal is to be your most reliable option for the stewardship of your renewable energy assets.

Why Choose Us?

- Technical Competency
- Shared Ownership
- Reliability
- Open Communication

Meet the Founders

We are a team of Engineers and Technicians with a track record in Renewables. Each of us has spent ~15 years in the field, working on the tools, building teams and solving problems.

We apply those lessons into our service operations at Optiv Energy.



Grayson Swan
President



Ben Emodi
VP, Growth



Taylor Williamson
VP, Technical Services



Andrew Arbuckle
VP, Development



Trent MacDonald
VP, Advisory Services



Ryan Howe
VP, Construction Management

Our Journey



2010 - 2019

We worked independently and then together across several organizations - starting in the field, then leadership roles and eventually as owners.

2019 - 2023

Through a series of mergers and acquisitions, we came together under a larger corporation, where we continued to grow the Renewables business as a team serving gigawatts of projects.

2024

Optiv Energy begins operations in both the U.S. and Canada - offering construction management and technical field services for solar, battery storage and wind energy.

Key Management Team

In addition to the founding team, several key team members support our IT, HSEQ, Field Management, Payroll/Benefits, and Finances.



Clinton Tonge
Director, Technology



Alfredo Avila
Field Manager



Ricardo "RJ" Esparza
Field Manager



An Tran
HSEQ Manager



Darren Stillman
Chief Financial Officer



Lisa Esparza
Payroll and Benefits Manager

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What We Do

Our customers are primarily owners and equipment manufacturers.

We have technical field expertise with battery storage, solar & wind projects.

Advisory Services

- Development Projects
- Pre-construction engineering and contracting
- Financial and investment decision making leading to FID

Field Services

- Pre Commissioning
- Cold Commissioning
- Hot Commissioning
- Planned Maintenance
- Warranty Services
 - Most major OEM's
- Retrofit campaigns

Construction Management

- Oversight and owners engineering on site
- From initial groundbreaking to COD

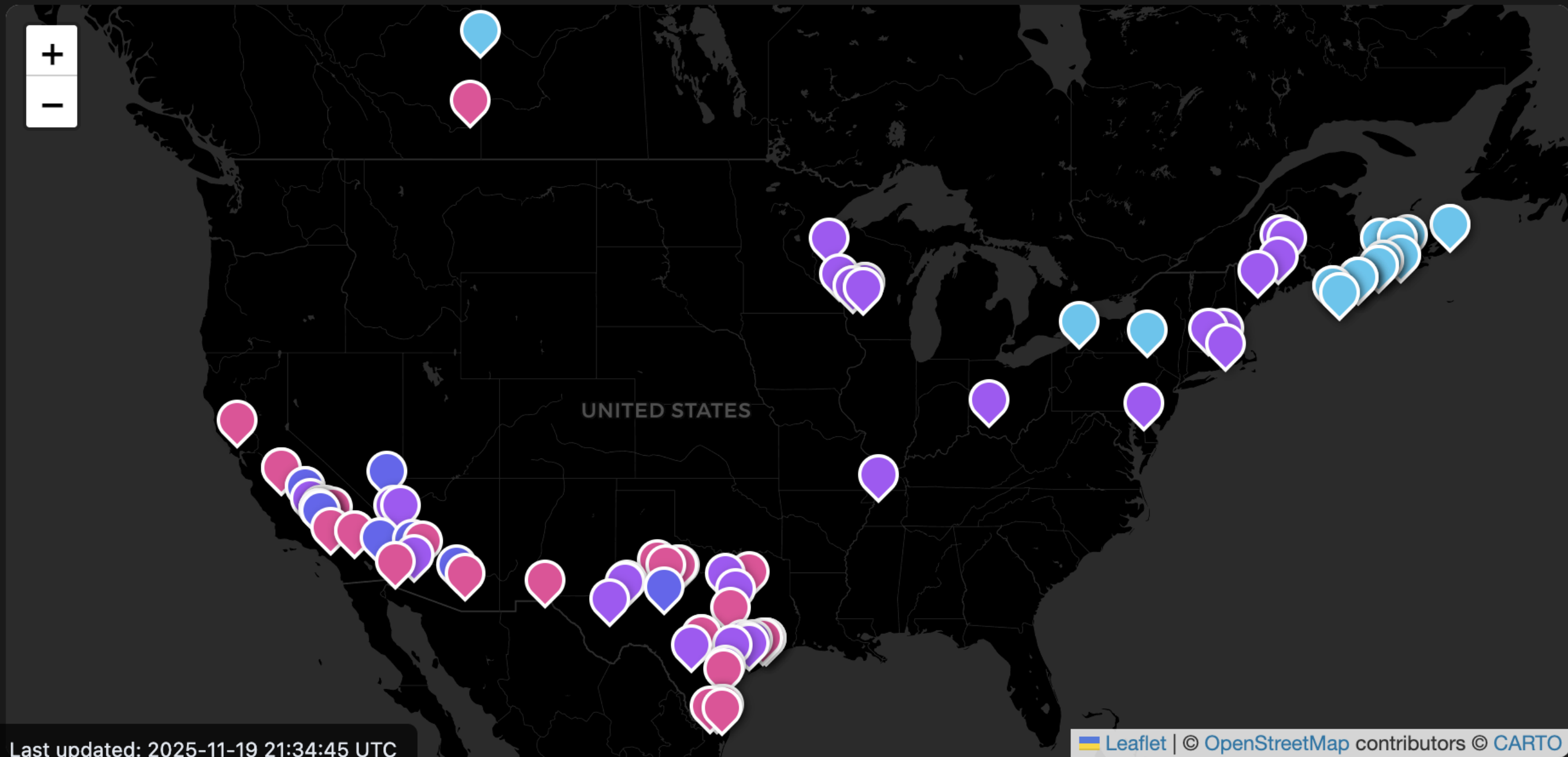
Where we Work

Wind
27
392.4 MWAC

Solar + Battery
10
1,931 MWAC / 5,214 MWh

Solar
36
3,158.2 MWAC

Battery
33
11,885.6 MWh



Health, Safety, Environment, Quality



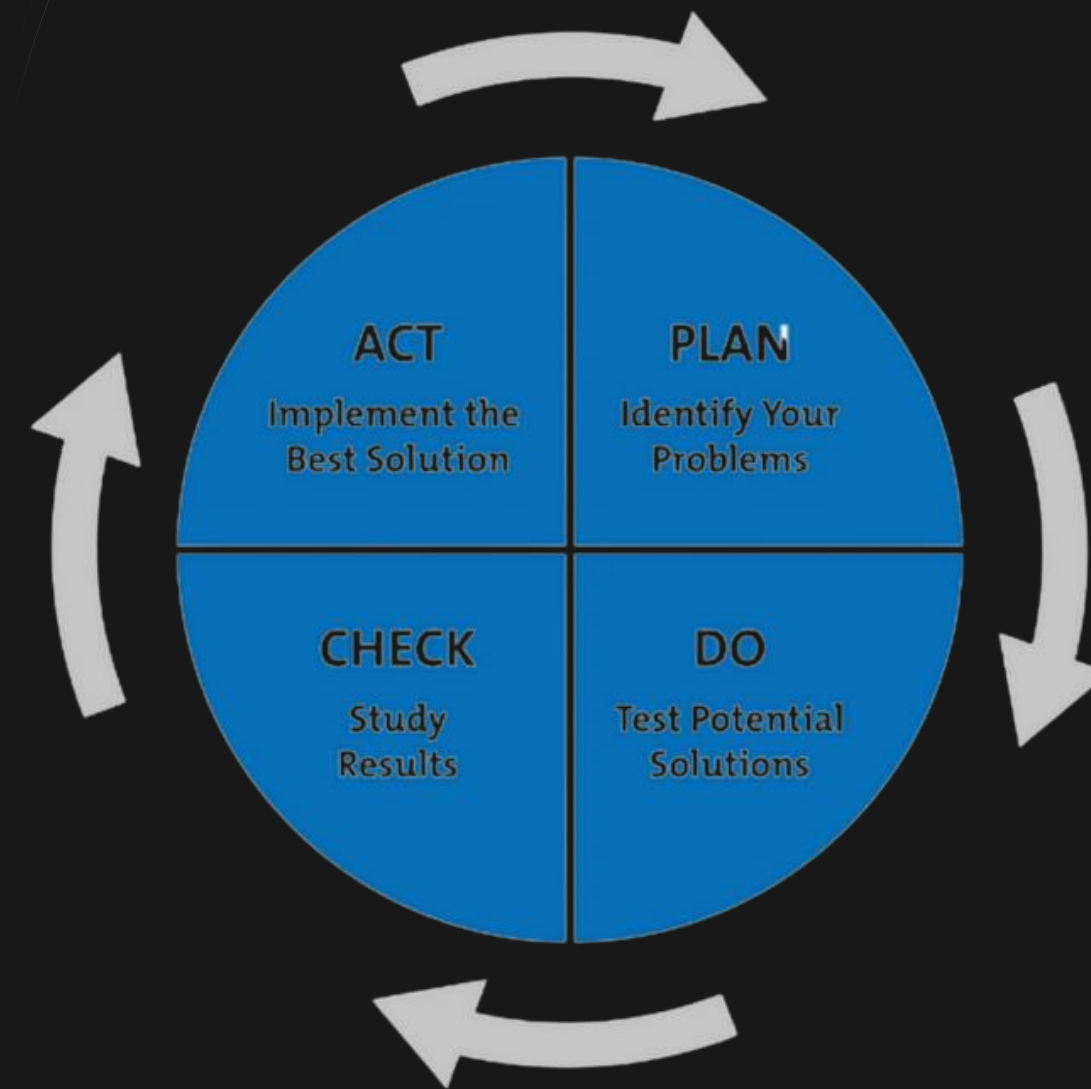
Comprehensive Programs

We have developed our HSEQ programs from years of experience in the field.



Digital, Mobile & Traceable

All reporting is accessible by mobile device, customizable, traceable and auditable.



Our Programs

We build and maintain comprehensive Health & Safety programs. They are working documents that we continuously improve.

HSE Programs	Scope of application
On-boarding - Training - Mentorship/apprenticeship	<ul style="list-style-type: none"> - On boarding and initial training procedure - Mentorship and/or apprenticeship process - Training matrix, competency review and evaluation
Hazard Identification & Assessment	<ul style="list-style-type: none"> - Comprehensive workplace hazard/risk assessment - Pre-job hazard assessment - Job/Site specific hazard assessment and Project HSE Plan
Proactive Safety Observation	<ul style="list-style-type: none"> - Safety observation (conditional and behavioral observation) - Communication of observation - Follow-up action
Incident Management	<ul style="list-style-type: none"> - Reporting incident - Incident investigation - Corrective actions & follow-up - Modify duty & return to work process
Personal Protective Equipment	<ul style="list-style-type: none"> - PPE policy - PPE requirements - PPE inspection
Inspection and Audit	<ul style="list-style-type: none"> - Safety inspection - HSE Management System audit
Hazardous Materials Control	WHIMIS/HAZCOM safety requirements
Electrical Safety	<ul style="list-style-type: none"> - Electrical safety policy - Electrical safety requirement and process
Hazardous Energy Control (LOTO)	<ul style="list-style-type: none"> - Hazardous energy control policy and safety requirements - LOTO procedure
Working at Heights	<ul style="list-style-type: none"> - Working at heights & fall protection policy - Working at heights' safety requirements
Environmental Management	<ul style="list-style-type: none"> - Environmental aspect identification - Environmental impact assessment - Environmental management program
Emergency Preparedness	<ul style="list-style-type: none"> - Emergency preparedness policy - General guidelines & requirements for emergency preparedness and response
Sub-contractor	<ul style="list-style-type: none"> - Sub-contractor policy - Requirements for sub-contractor

Training

We hire experienced, qualified technicians, provide in-person training and work with OEMs on equipment specific certifications.

Each Optiv team member is onboarded into the company through our Dallas Fort-Worth office.

We re-certify compliance trainings and provide hands-on LOTO / Electrical trainings and competency checks.

For OEM services, we invest in our people to receive the latest OEM and equipment specific certifications.

Optiv Training Program

- | | |
|---------------------------|---------------------------------------------------------------------------------------------------------------------|
| ✓ Protection & Control | ✓ Battery Safety Training |
| ✓ OSHA 10 | ✓ NFPA 70E & 70B + MV Switching + TX Maintenance |
| ✓ OSHA 30 (if applicable) | ✓ Electrical 101 (Principles) |
| ✓ First Aid | ✓ Electrical Distribution/Transmission |
| ✓ NFPA 70E | ✓ Drawings / Schematics |
| ✓ WAH & Rescue | ✓ BESS Fundamentals & Safety |
| ✓ Hazcom/WHMIS | ✓ Solar Fundamentals & Safety |
| ✓ Confined Space | ✓ Tooling / Testing Equipment Operations (Meter safety, insulation resistance, infrared thermography, torque, etc.) |
| ✓ LOTO | ✓ Networking, SCADA, DAS (Cat5e, RS485, Modbus) |
| ✓ Fire Extinguisher | |

Optiv Learning and Certification Management System

CERTIFICATION NAME	CATEGORY	ISSUING AUTHORITY	EXPIRY
> Adult CPR & First Aid 1 course	Safety	Pro Trainings	No Expiry
> Field Supervisor - Safety & Compliance 1 course	Safety	Optiv Energy	No Expiry
> NFPA 70E for Qualified Persons 1 course	Safety	UL Solutions	No Expiry
> OEM Training: LG Vertech JF1 1 course	Technical	Optiv Energy	No Expiry
> OEM Training: LG Vertech JF2 1 course	Technical	Optiv Energy	No Expiry
> OEM Training: LG Vertech JH4 1 course	Technical	Optiv Energy	No Expiry
> OSHA 10: Construction Industry 1 course	Regulatory	UL Solutions	1825 days
> OSHA 30: Construction Industry 1 course	Regulatory	UL Solutions	3650 days
> Technician (Wind) 6 courses	Technical	Optiv Energy	No Expiry
> Technician I 12 courses 80h	Technical	Optiv Energy	No Expiry
> Technician I - Safety & Compliance 6 courses	Safety	Optiv Energy	No Expiry
> Technician II 8 courses	Technical	Optiv Energy	No Expiry
> Technician II - Safety & Compliance 4 courses	Safety	Optiv Energy	No Expiry
> Technician III 6 courses	Technical	Optiv Energy	No Expiry
> Technician III - Safety & Compliance 2 courses	Safety	Optiv Energy	No Expiry

OPTIV ENERGY
 OFFICIAL TRAINING RECORD
CERTIFICATE OF COMPLETION
 This certifies that
John A. Smith
 has successfully completed the training for
OSHA 10: Construction Industry
 Issuing Authority: UL Solutions
 CERTIFICATE NUMBER: OPT-OSHA10
 EFFECTIVE DATE: December 11, 2025
 EXPIRATION DATE: December 11, 2028

Bespoke LMS Platform Integrates with 3rd Party Content and Compliance Certification Providers Provides 100% Clarity on all Employee Certifications and Training

Training Content

Battery Energy System Fundamentals

The AC power from the grid is fed to a bus at a voltage of 660 volts AC. The bus is connected to the primary side of the medium voltage transformer. The transformer steps the voltage to 34.5 kilovolts.

Chapter 4: Substation Safety

This course will focus on single-line diagrams, the most common type of diagram used in the operational section of a plan set. Single-line diagrams are comprehensive flow diagrams that provide an operational overview of an electrical system or electrical component. Single-line diagrams are also called by other names such as electrical prints, schematics, or simply single-line diagrams. Single-line diagrams use a single line to represent the multiple phases of the power system, making it easy to follow and providing equipment rating functions.

Chapter 4: Single Line Diagrams Overview

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SCADA Fundamentals

A technician will assign network identification numbers, referred to as IP addresses, to every switch and network device. This will include those in the control room. The result is that every device in the tracking system, and the technician can monitor on the same site a unique address. The IP address is a prefix to all incoming and outgoing signals. The equipment receives the commands and sends the applicable data.

Chapter 1: SCADA Overview

Chapter 4: Solar Generation Facility

The power from the common mode isolation coil will end up on DC buses on which the inverters are mounted. Each DC bus consists of three phases. Although there are three IGBTs, for simplicity, we will only use one phase to explain. The IGBTs are essentially electronic switches that control the flow of current when a signal from the control board is provided. The IGBTs can switch at essentially any rate. The design of the inverter using pulse width modulation (PWM) means that the width of the pulse can be varied as needed to produce an output voltage that is the average of the pulses. Shorter pulses produce a lower voltage and longer pulses produce a higher voltage.

Chapter 4: Pulse Width Modulation

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Systems & Reporting

We build a database for each site, creating a hierarchy of digital assets.

We use *Limble* as our CMMS. We create a database and digitize your site & each piece of equipment as an asset using the following hierarchy:

- Customer
- Project Site (Asset)
- Sub-Asset (i.e. inverter or piece of equipment being worked on)

Within this digital database, we create a dashboard for you to monitor progress. We file detailed work orders for each task performed - detailing tasks, photos, records of LOTO Procedures & Field Level Hazard Assessments, and any corrective action taken.

Every scope performed that day is digitally mapped and stored, along with records of our people, time, tooling and safety documentation.

Optiv Business Intelligence Portal

The screenshot displays the Optiv Business Intelligence Portal interface. On the left is a navigation sidebar with categories like Activities, Assets and WOs, People and Jobs, Training & Safety, Community, Administration, and Technician Mode. The main content area features a 'Health & Safety Dashboard' with filters for Start Date (2025-11-12) and End Date (2026-02-10). It shows a total of 347 FLHA tasks and a bar chart titled 'Tasks Created Per Week' with data points from 10/19 to 2/7. Below the chart is a table of FLHA tasks with columns for Task ID, Location, Asset, and Name.

Overlaid on the dashboard is the 'Optiv Energy Claude' chat interface. The user's prompt is: 'Analyze FLHA work orders for Midpoint this month and flag any recurring safety issues that have not been mitigated'. The AI response includes a summary of completed FLHA assessments and identifies recurring safety issues, specifically highlighting wildlife hazards that are inadequately mitigated.

Analysis of FLHA Work Orders for Midpoint - February 2026

Summary of Completed FLHA Assessments:

- **Total FLHA forms reviewed:** 7 completed forms (Feb 2-8, 2026)
- **Lead Technician:** Mark S. (on all forms reviewed)
- **Common work type:** Site support & Troubleshooting

🚨 Recurring Safety Issues Identified:

1. Wildlife Hazards - INADEQUATELY MITIGATED

- **Frequency:** Identified in 4 out of 5 fully reviewed forms (80%)
- **Specific hazard:** "Wild life" or "Wildlife" consistently listed under Environmental hazards
- **Current control:** Only generic control listed: "kick it before you pick it"
- **CRITICAL FINDING:** This control is insufficient for wildlife encounters and does

At the bottom of the chat interface, it shows 'Model: Claude Opus 4.5 (Most Capable)', a text input field with the placeholder 'Ask Claude about Optiv Energy...', and a 'Send' button. Token usage and cost information are also visible: 'Tokens: 227168 in / 1527 out | Session: 408524 in / 3092 out | Cost: \$0.7044'.

Centralized Business Data optimized for AI tools.

Rapid insights and advanced ad-hoc reporting using embedded Anthropic Claude AI.

Project Highlights

In the Field

We earn your trust through the quality of our work.



Project Highlights

We work to optimize the MWh production from your renewable energy assets.



Next Steps



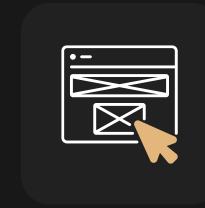
Sign Mutual NDA

Execute a mutually binding non-disclosure agreement to protect commercially sensitive information.



Project Needs

Explore project opportunities and gather detail on technical, schedule and resource requirements.



Execute MSA

Establish a framework for pricing, terms and conditions that are mutually agreeable and allow us to support you as needs arise.



Schedule Technicians

Agree on a budget, resources and schedule technicians for specific scopes of work. Schedule project kick-off calls & mobilize to site.

Closing Message

Thank you for taking
the time to learn about
Optiv Energy.

OPTIV  ENERGY

We look forward to earning your trust one project
at a time and optimizing the performance and
lifespan of your assets.

Contact Us

 E-mail
connect@optivenergy.com

 Website
www.optivenergy.com