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2025 Financial Assistance Summit

Powering communities, together

01 Welcome and introduction

Rob Hatley
Group VP, Corporate Affairs and Communications

Sandra Diggs-Miller
VP, Consumer Advocacy and Programs

10 minutes

*Cut to Civic 50 Video *

2 minutes

Introductions

Sandra Diggs-Miller
VP, Consumer Advocacy and Programs

5 minutes

02

FINA desk updates

Chris Osbon
Manager, Consumer Advocacy and Programs

Shannon Lawson
Specialist III, Consumer Advocacy and Programs

20 minutes

Reminders

Business hours

- Monday through Friday, 7:30 a.m. to 12:00 p.m. and 1:00 p.m. to 4:30 p.m.
- FINA desk staff are not available on the weekends, so please be sure to notify us of urgent disconnection cases well before the work week concludes.
- For emergencies occurring after hours, contact Chris Osbon.
  cosbon@entergy.com
  318-680-0647

Speaking with customers

- Our FINA email inbox and phone line are exclusively reserved for communication with agency partners.
- Please do not release FINA contact information, especially to customers, as it impairs our ability to respond to you in a timely fashion.

Information

- Please include an account number and your full agency name in all correspondence with us.
- FINA payments mailing address:
  Entergy- FINA
  PO Box 8102
  Baton Rouge, LA 70891-8102

Welcome to the Financial Assistance Portal

Through the Financial Assistance Portal, local agencies can provide support for community members who need help paying their bills. Agencies can view customer account history and grant pledges to prevent disconnection or restore services.

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How do we get started?

Registering as a new agency

- We need some information about your organization before we can register you in our system and provide you access.
- Please email Shannon Lawson at slawson@entergy.com for a copy of the application shown here and return it to me with your responses.

- Organization name and mailing address
- Street address (if different from mailing address)
- Telephone number with area code
- 501c3? (Y/N)
- Government agency? (Y/N)
- Religious institution? (Y/N)
- Tax ID#
- Website address
- Executive Director / Administrator Name
- Administrator email address
- Names and email addresses of individuals authorized to make pledges
- Funding source(s) of utility bill payment assistance
- Years the organization has provided utility bill payment assistance
- Approximate annual utility assistance program budget amount

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Corporate Social Responsibility
639 Loyola Ave.
New Orleans, LA 70113
Mail Unit: L-ENT-6D
Tel 504 576-6980

Thank you for your interest in joining Entergy's Financial Assistance Pledge Program. As a pledging agency, we require that all pledges be entered through Entergy's online Financial Assistance (FINA) Portal. A 1-800 FINA help desk number and email inbox are available Monday – Fridays from 8 am to 5 pm.

Payments on pledges should be mailed to the FINA PO Box address that will be provided upon approval of this application. Large transactions including multiple customer accounts should be paid by electronic bank or ACH transfer to ensure that customer accounts are properly credited in a timely fashion.

Additional instructions about the FINA Portal and ACH transfer payments will be sent once your organization is approved for the FINA program.

Please answer the following questions to initiate the process for access to pledging on customer accounts:

- Organization name and mailing address
- Street address (if different from mailing address)
- Telephone number with area code
- 501c3? (Y/N)
- Government agency? (Y/N)
- Religious institution? (Y/N)
- Tax ID#
- Website address
- Executive Director / Administrator Name
- Administrator email address
- Names and email addresses of individuals authorized to make pledges
- Funding source(s) of utility bill payment assistance
- Years the organization has provided utility bill payment assistance
- Approximate annual utility assistance program budget amount

How do we get started?

Registering as a new agency

- Once your agency has been registered and an administrator has been assigned, you will be able to access the Financial Assistance Portal.
- Current portal admins should select at least one other employee to serve as a back-up.
- It is important that each agency have more than one admin in the portal in case the primary admin is unavailable for the monthly verification.
- User accounts must be verified before the 1st of every month.
- Portal admins receive an email notification 7 days prior to deactivation. If you are an admin and do not receive these emails, please let us know.

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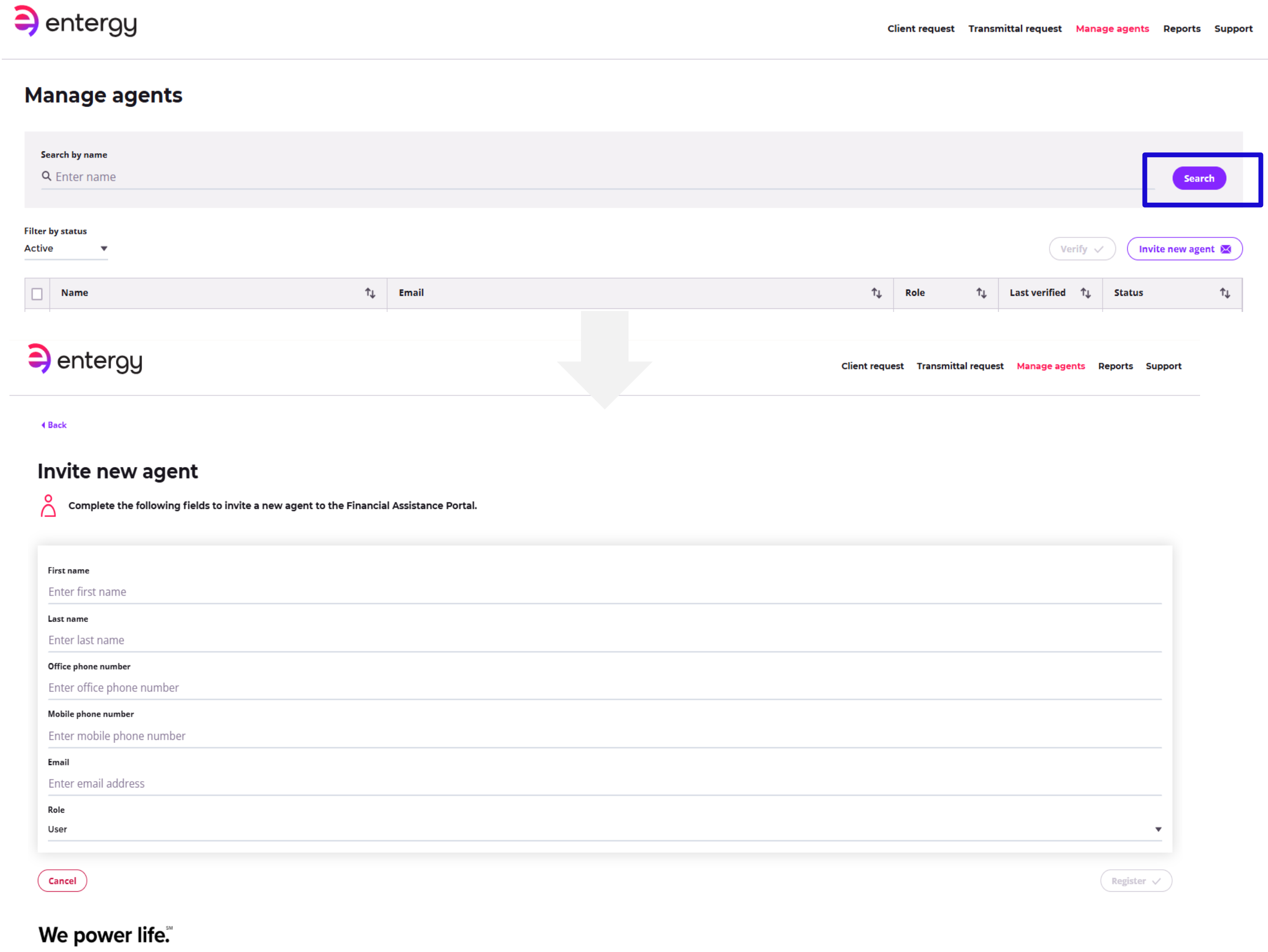
How do we get started?

Registering as a new user

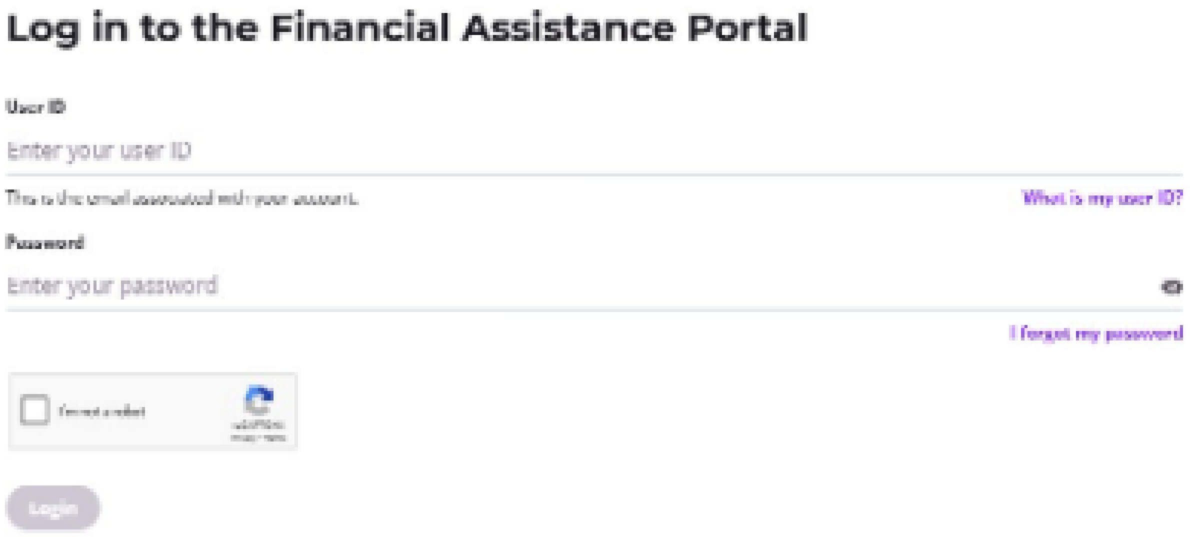
- Agency administrators can invite new users to access the Financial Assistance Portal.
- Under ‘Manage agents’ select ‘Invite New Agent,’ complete the following fields (name, phone number, email address and role) and click ‘Register.’
- Once the form has been completed and submitted by the admin, the user will receive an invitation to the registered email address. The user must accept the invitation and create a password.
- Now that you have your login credentials you will be able to access the portal.



How do we access the portal?

Logging in

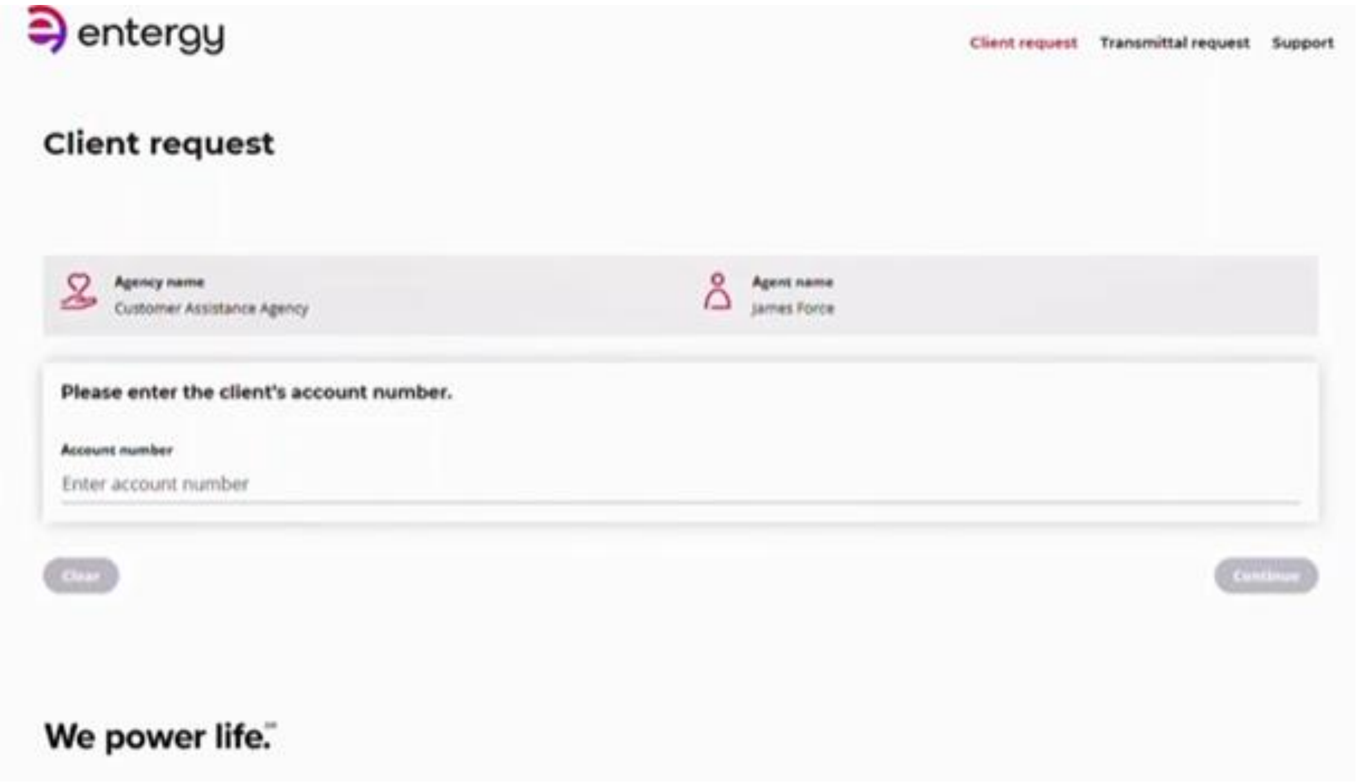
- Enter the User ID (registered email address) and Password you created and click ‘Login.’
- The login page also offers helpful options to recover your User ID or password at any point.



How do we view customer information?

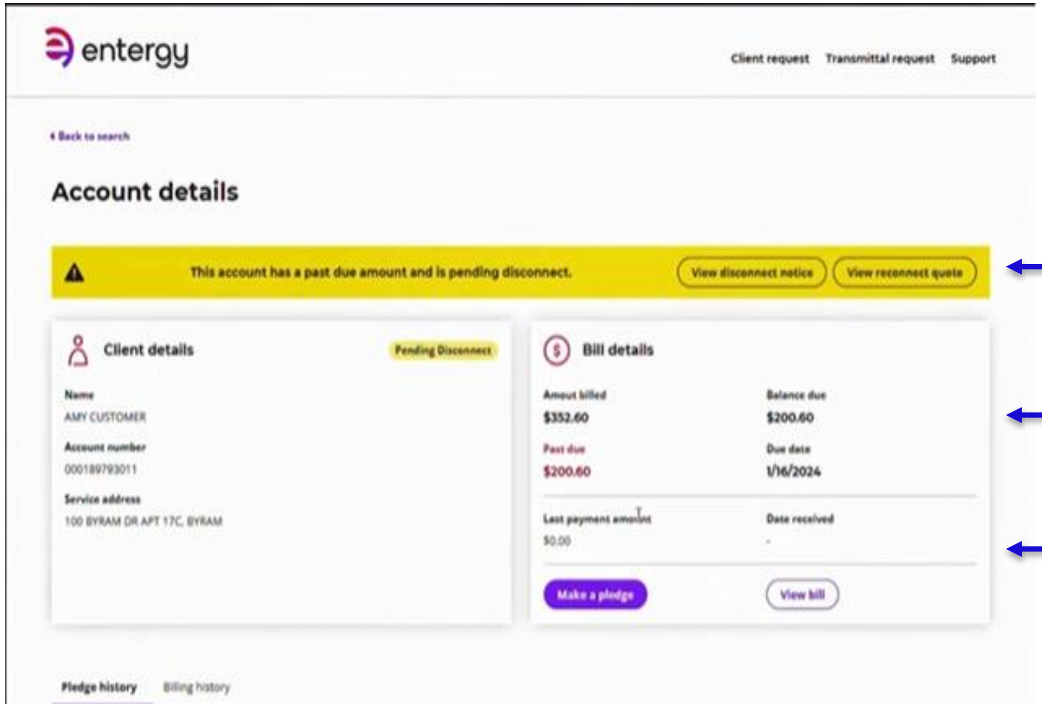
Accessing the customer information page

- Once you are logged in, you will be taken to our newly designed client request form.
- Enter the account number and click continue to view the client's account information, which includes several different fields, data points and documents.
- You are only able to access information about customers located in your service area for data security purposes.



What customer information is included?

Client details such as name, account number and service address can be used to verify the client's application information.



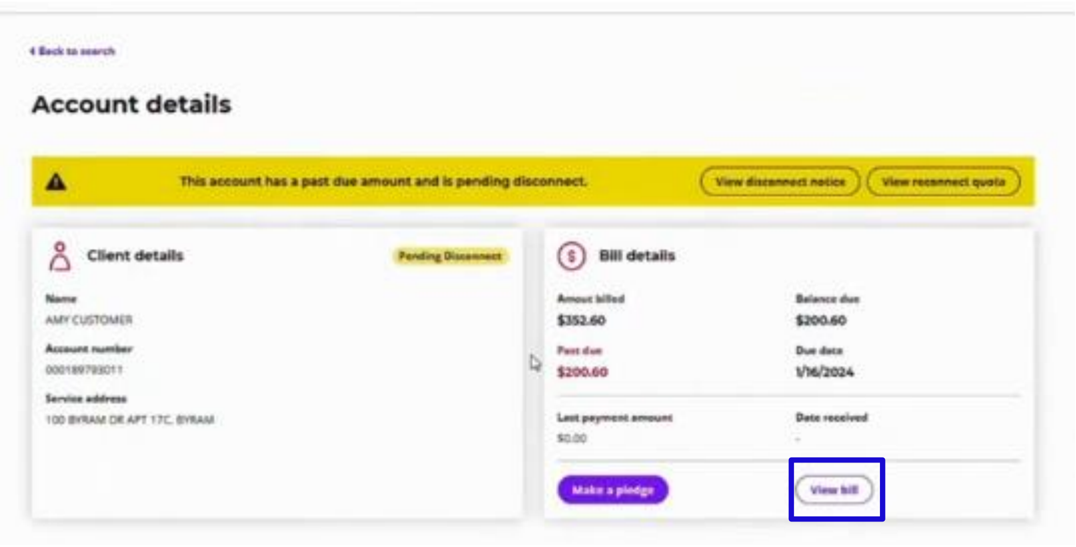
Options to view and print the disconnect notice and view the reconnect quote as applicable.

Bill details display the customer's total balance including any past due amounts outstanding and the due date of the most recent bill.

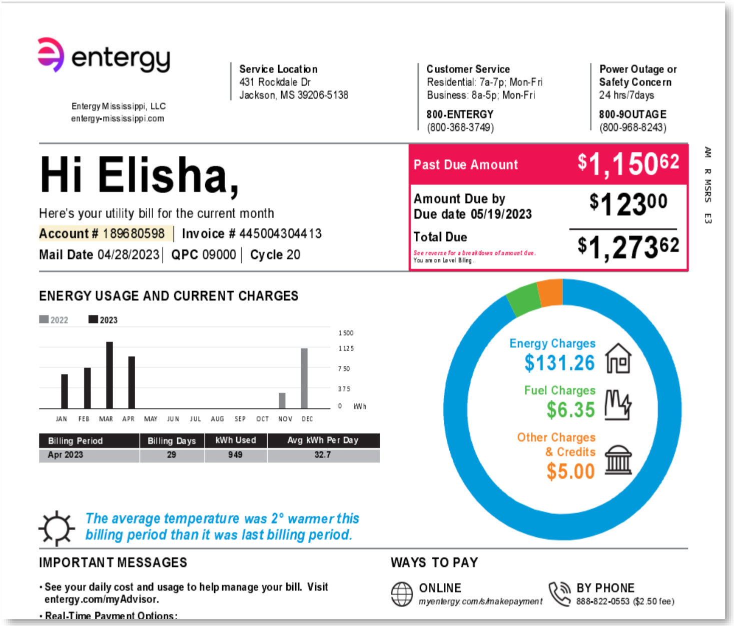
Denotes the last payment amount and date received.

What else can I see?

Viewing a bill

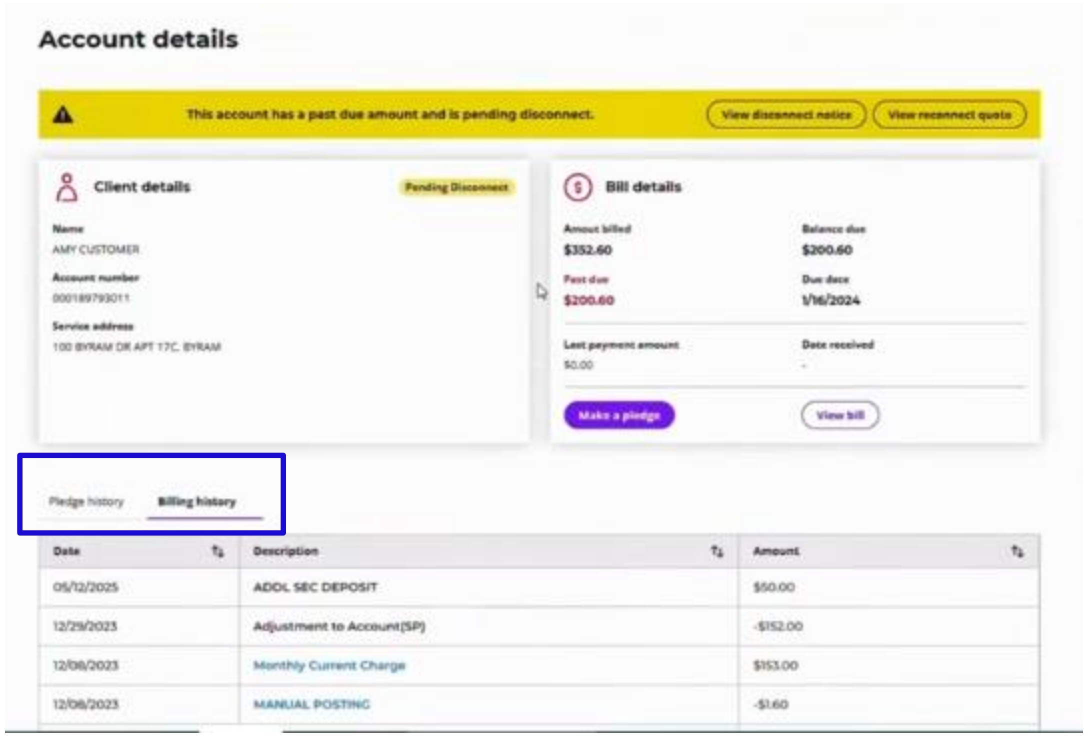


- The 'View Bill' link allows you to view and print the customer's current bill.



What else can I see?

Viewing the billing and pledge history



- Once you select the ‘Billing History’ tab, the monthly charges, late fees, installment plan balances, payments and more are displayed.
- Click the ‘Monthly Current Charge’ link to view a copy of the customer's bill for the respective month.
- The 'Pledge History’ tab displays a list of pledges made on the customer’s account by your agency.
- There are 4 pledge statuses:
  1. Open – outstanding pledge
  2. Cancelled – cancelled pledge
  3. Paid – paid pledge
  4. Expired – pledge was not paid by the due date

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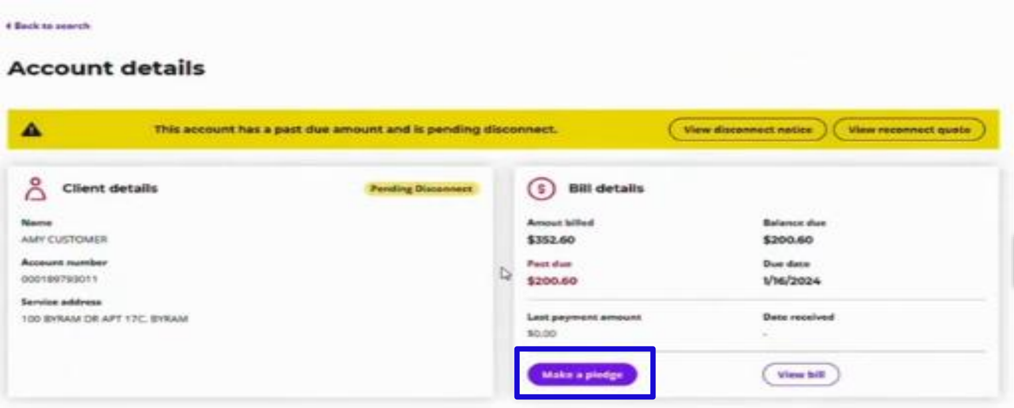
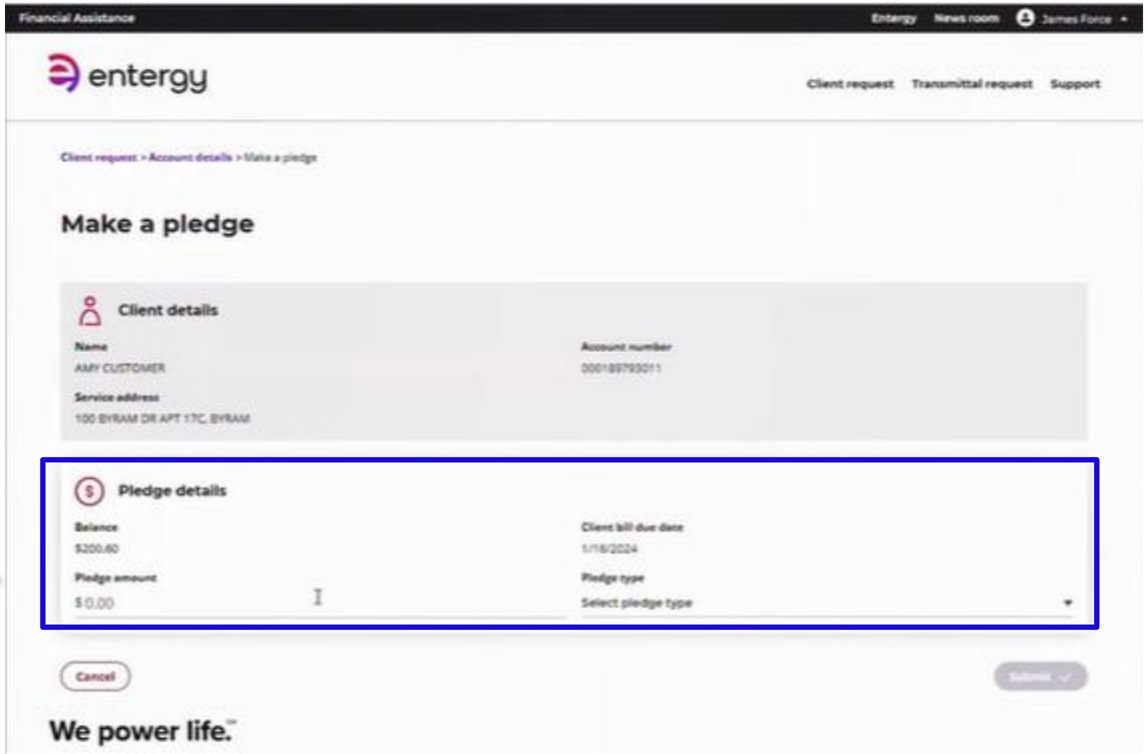
How do we pledge on an account?

Making a pledge

- Click on the ‘Make pledge’ button below bill details.
- Enter your approved pledge dollar amount.
- Select a pledge type from the drop-down list of options.
- Click ‘Submit.’

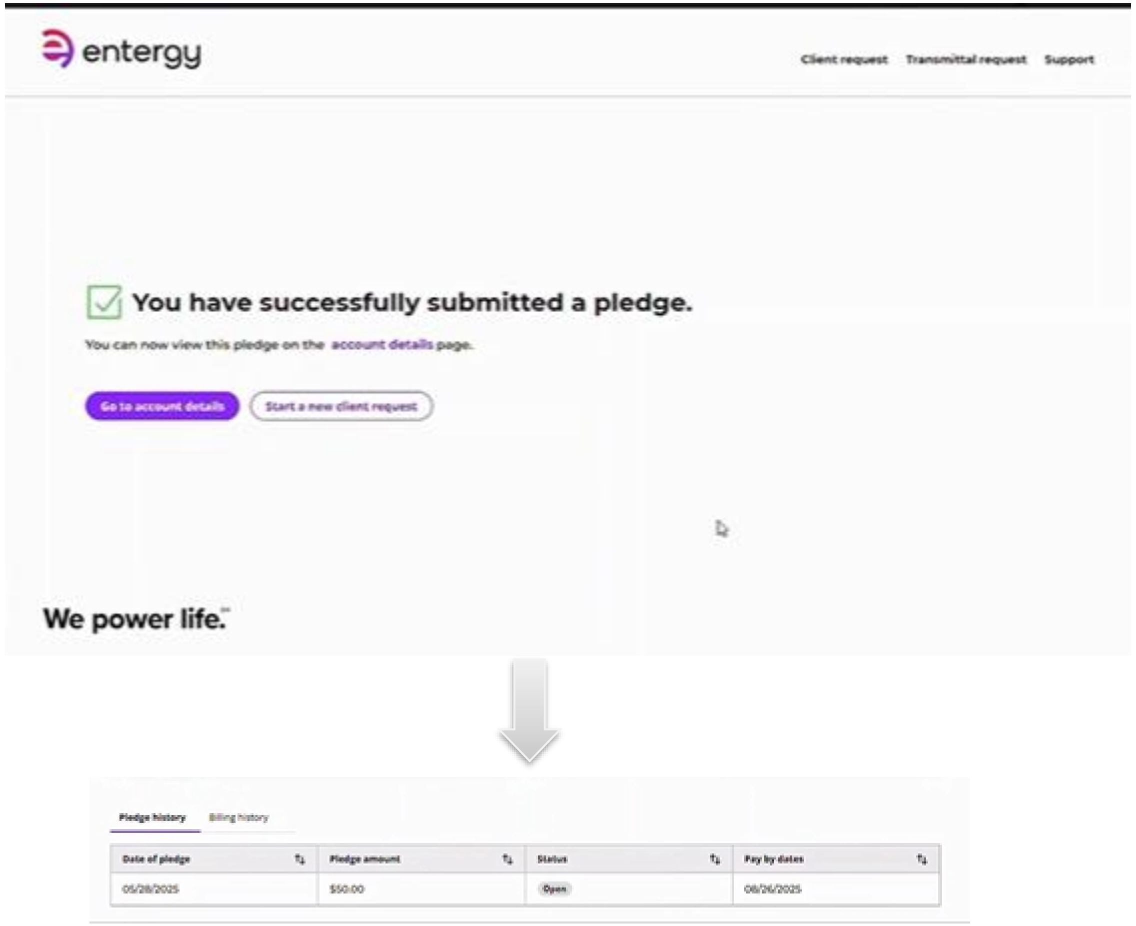




How do we pledge on an account?

Reviewing and confirming a pledge

- Once the pledge has been successfully submitted, it can be viewed on the accounts detail page and cannot be changed by anyone but FINA support staff.
- ***Important*** If the account has a warning message, you will not reach this page. You will receive an error message on the prior page. In these cases, email finadesk@entergy.com to investigate the account.



Announcements

Co-Browse

- The 'Co-Browse' feature allows you to screenshare with a Financial Assistance team member.
- Select the 'Co-Browse' link at the bottom of the 'Client Request' page.
- Provide the 4-digit code to the representative that you are speaking with to start sharing your screen.

Support

- The 'Support' page has helpful information such as FAQ's and Financial Assistance contact information.

Transmittal reports

- When you are ready to make a payment, save your transmittal reports as Excel spreadsheets and mail them in with your payment or email them to finadesk@entergy.com.

03

Federal LIHEAP update

Sean Finnerty
Director, Federal Government Affairs

5-10 minutes

2025 LIHEAP update

Low Income Home Energy Assistance Program (LIHEAP) – federal program that provides funds to help low-income households pay for energy needs.

- Defined as households with incomes ≤150% of the federal poverty line **or** ≤60% of state median income (whichever is higher)

FY26 Appropriations:

- Senate Labor, HHS, Education bill provides $4.045B, a **$20M increase**
- House Labor, HHS, Education bill provides $4.035B, a **$10M increase**

Program in dispute:
LIHEAP's future funding is uncertain, with advocates concerned that efforts to cut or eliminate the program could be disastrous for the low-income households who rely on it.

Historical context:
Funding levels for LIHEAP vary year to year based on congressional appropriations and supplemental funds provided during emergencies.

40% **of Entergy's residential customers live at or below the poverty line. Our focus on poverty is rooted in the economic reality of the communities we serve, which include some of highest poverty regions in the country.**

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04

Payment processing policy update

Leigh Ann Burt
Manager, Payment Processing

5 minutes

Payment processing

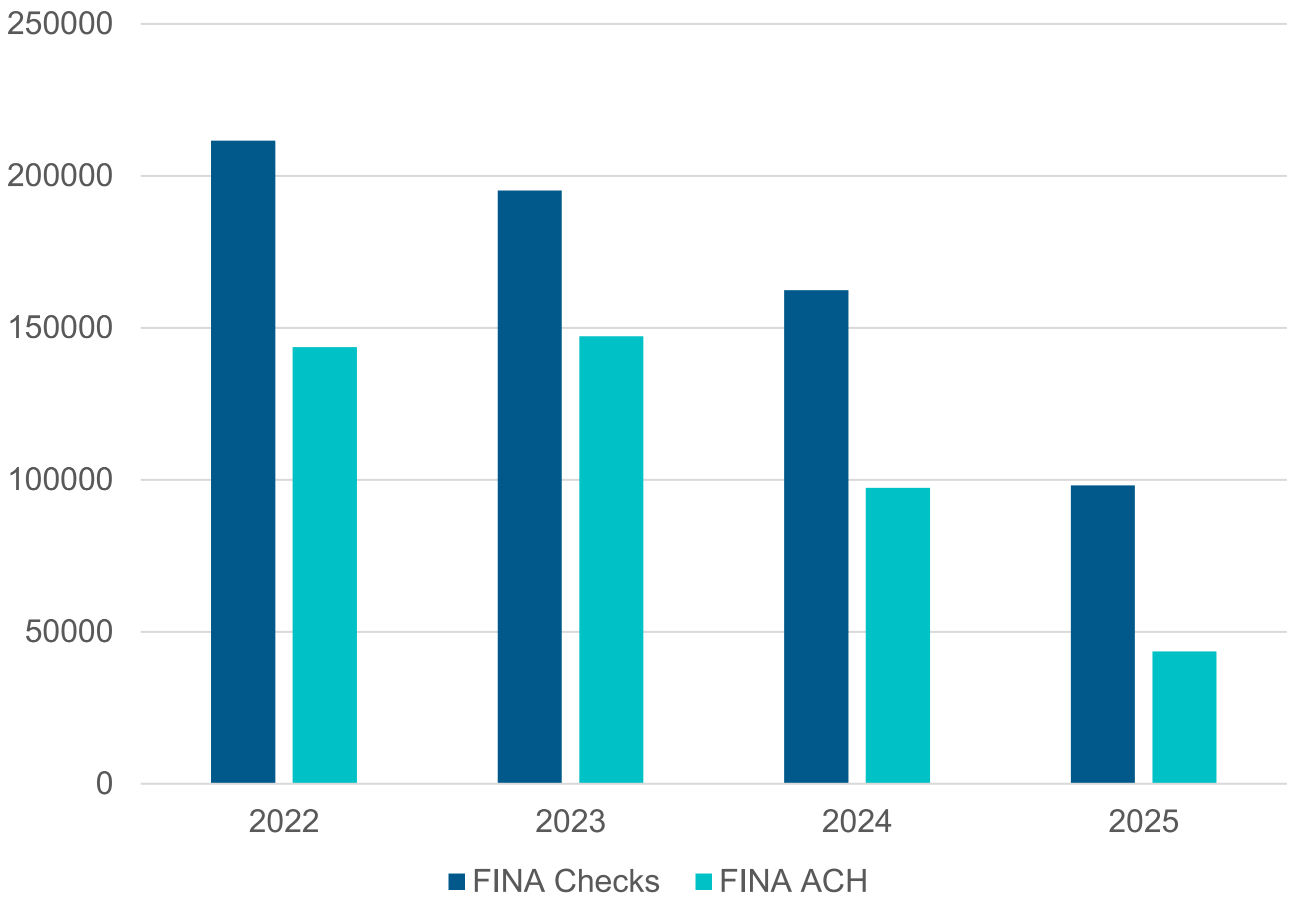
142K
YTD # Processed

$43M
YTD $ Processed

Roles and responsibilities

Payment processing serves a separate role from the FINA desk and corporate social responsibility:

- Processing checks and ACH (CTX) payments to account numbers designated by originating agency.
- Assist agencies with tracking lost checks & payments.
- Process refunds of FINA transactions.
- Support mass customer account pre-validations.



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Methods of payment

FINA ACH (electronic)

- Requires CTX formatting.
- Assist up to 9,999 people with one ACH transaction.
  - Bank rejection will occur, if exceeded.
- Save time & money on printing checks & postage.
- Ensure that funds post to customer the same day as agency funding.
- Eliminate repeat calls from customers checking on pledge payments.
- To realize the recipient benefits above, pre-validation of accounts prior to the file transmission is **strongly recommended.** Mass pre-validation requests should be sent to FINADesk@entergy.com and CC, cwill58@entergy.com, sluce@entergy.com, and trobi10@entergy.com.
- Failure to provide active, valid accounts will result in significant delays in payment posting.

Mailed in Check

- Compatible with all banked agencies.
- Assist up to 300 people with one check.
- Inherent delays with mail processing.
- May result in repeat calls from customers checking on pledge payments, late fees, disconnects, etc.

- All checks benefitting more than 50 recipients MUST e-mail stub instructions, preferably an excel spreadsheet to remittanceprocessingteam@entergy.com and CC cwill58@entergy.com, jcoll15@entergy.com, saddiso@entergy.com and BGUERRA@entergy.com.

- Failure to provide active, valid accounts will result in significant delays in payment posting.

Failure to pre-validate leads to...

Customer

- Delayed financial assistance
- Late fees / disconnects
- Additional deposits

Agency

- Refund requests
- Lengthy refund timelines
- Recipient complaints

Entergy

- Manual investigations of mass unapplied payments
- Regulatory complaints
- Correspondence
- Collections

For questions about Financial Assistance related to Payment Processing, please reach out to:

- Leigh Ann Burt, Manager, Payment Processing - lmathes@entergy.com
- Christopher Williard, Analyst II, Payment Processing - cwill58@entergy.com

Recommendations (based on 2024)

Agency

- Customer account validation (FINA Portal)
- Requesting mass pre-validation assistance
- Regular auditing of payments
- Customer notification partnership

Entergy

- Implemented daily reconciliation
- Notify agencies of invalid Entergy account submissions
- Returning funds unable to post to valid Entergy account

712

Agency refunds for invalid accounts in 2024 totaled to

$2,138,733

For questions about Financial Assistance related to Payment Processing, please reach out to:

- Leigh Ann Burt Manager, Payment Processing - lmathes@entergy.com
- Christopher Williard, Analyst II, Payment Processing – cwill58@entergy.com

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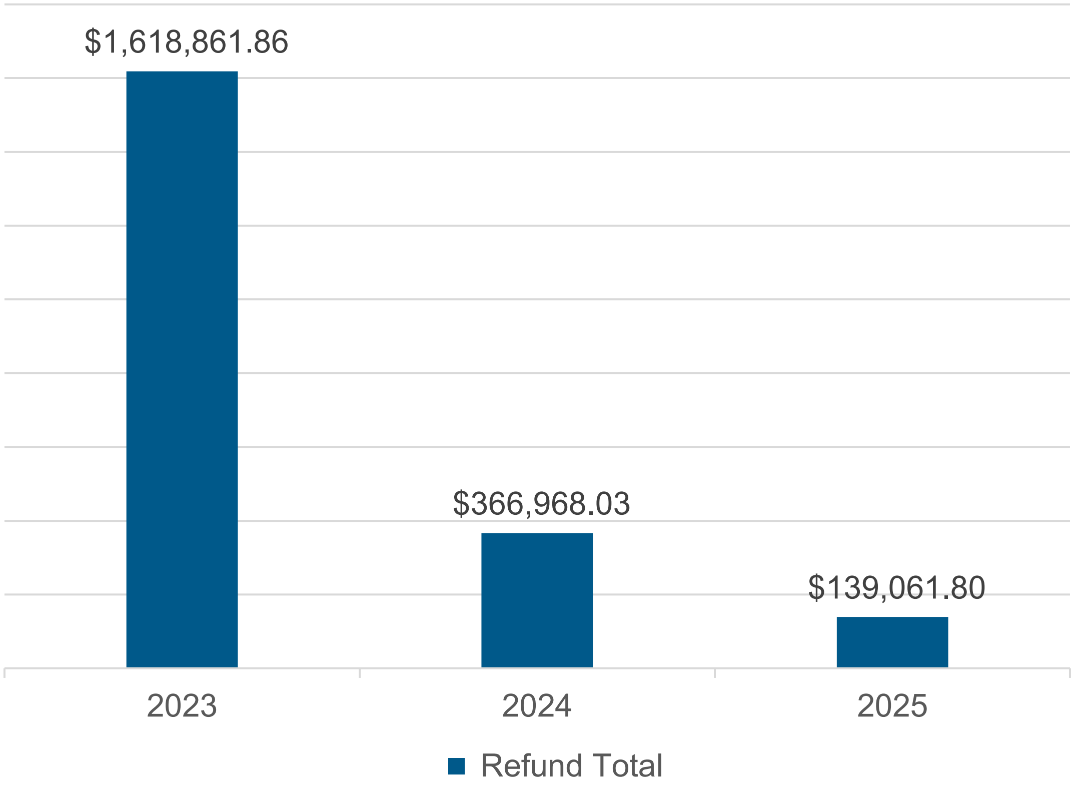
The power of pre-validation

Agency that pre-validates

- Requesting mass pre-validation assistance
- Secure file share or email excel file to payment processing
- Updates records before sending ACH file for processing

Entergy

- Notify agencies of invalid Entergy account submissions via email
- Returning fewer funds unable to post to invalid or inactive Entergy account due to mass pre-validation



For questions about requesting mass pre-validation, please reach out to:

- Leigh Ann Burt Manager, Payment Processing - lmathes@entergy.com
- Christopher Williard, Analyst II, Payment Processing – cwill58@entergy.com

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05 The Power to Care

Jean Walker
Specialist III, Consumer Advocacy and Programs

5 minutes

Program information

Description

- The Power to Care is a utility assistance fund that provides bill payment to the elderly and disabled with limited incomes.
- Nonprofit organizations, city government and faith-based institutions serve as participating agencies to help customers complete applications and verify income information.
- Donations from Entergy customers and employees are matched by shareholders, and 100% of funds are used for bill payment.
- Funds availability is first come first served basis; funding is replenished month by month.

Eligibility

- Annual incomes at or below 150% of the federal poverty level or 60% of the state median income may qualify 60 years of age or older; Clients who are 18 years old and older are eligible if they are mentally and/or physically disabled
- Disability of the client or spouse / dependent living in the household
- The program may close for periods of time when funding is depleted.

Administrators and caps

Program	Administrator	Annual Benefit Cap
Arkansas	Mid America Assistance Coalition	$500/annual
Louisiana	Mid America Assistance Coalition	$500/annual
New Orleans	New Orleans Council on Aging	$500/annual
Mississippi	Mid America Assistance Coalition	$500/annual
Texas	Mid America Assistance Coalition	$500/annual

The Power to Care

Results

- Entergy matches all customer donations dollar for dollar up to $500,000 annually.
- Employee donations are matched dollar for dollar with no cap on the amount of the match.

Jurisdiction	Match Award	Total
Arkansas	$150,698	$599,381
Louisiana	$261,005	$1,023,801
New Orleans	$110,110	$377,114
Mississippi	$170,886	$628,797
Texas	$111,129	$408,228
Total	**$803,828**	**$3,037,321**

The Power to Care

06

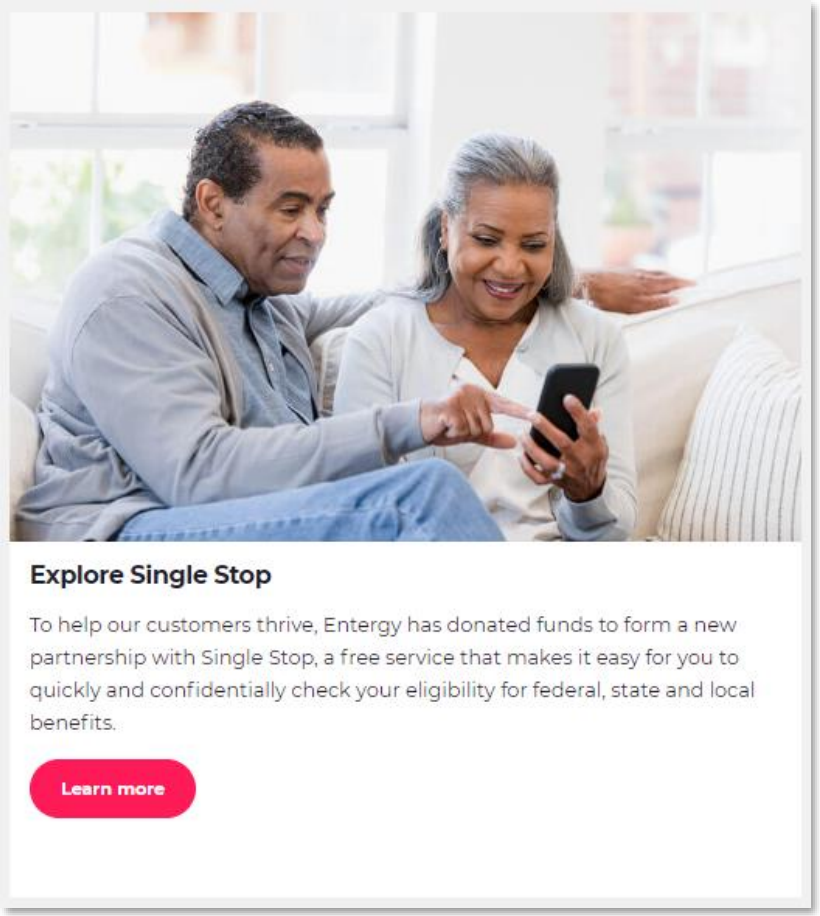
Single Stop

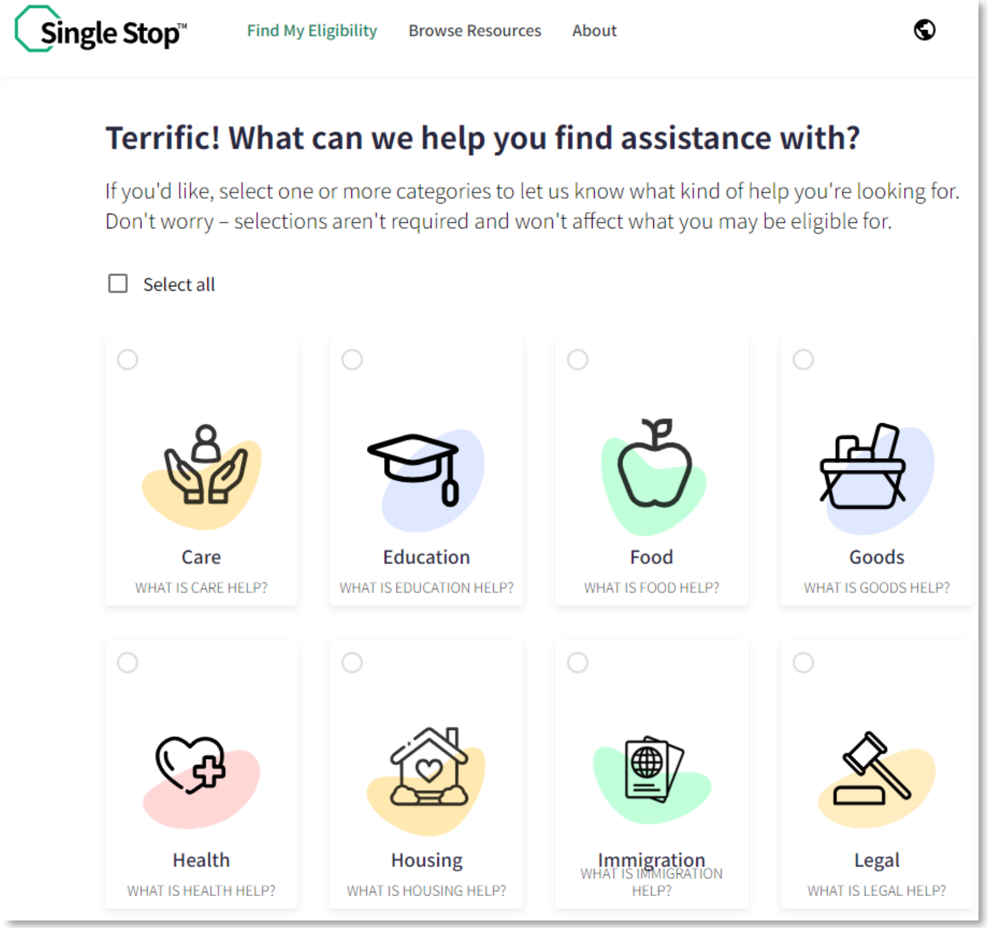
Christine Jordan
Manager, Corporate Social Responsibility

5 minutes

Introducing: Single Stop

Entergy is the first utility company ever to partner with Single Stop, a free service that makes it easy for customers to check their eligibility for state/federal benefits and find local social services.





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Single Stop to date

- Provided all residential customers access to Single Stop screener in January 2024
- Currently conducting case management pilot in New Orleans with 100 low-income households

Stats	Jan 1 – Oct 21, 2025	Grand Total (Jan 1, 2024 – Oct 21, 2025	Notes
Households Screened	5,334	11,877	
Individuals Served	7,964	16,144	
New Benefits Identified	$103,714,542	$223,540,236	Grand total is through Sept. 30.
Benefits Reported Received*	$565,848	$565,848	Amounts are the same because self-reporting wasn't available until 2025.

*In late 2024, Single Stop added a feature to their screener that enables users to self-report what they have applied for and what they have received.

07

Special giveaway

Chris Osbon
Manager, Consumer Advocacy and Programs

5 minutes

Special giveaway!

Two $300 grants to provide lunch for your CAA.

One $3,000 grant to attend NEUAC's 2026 Conference in Seattle, WA.

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08

Q&A session

Sandra Diggs-Miller & Chris Osbon
VP, Consumer Advocacy and Programs

20 minutes