



Trane Sales Plan

FALL 2021

SALES PLAN #:

SP-Ferguson Fall Sales Plan

PROGRAM NAME:

2021 Fall National Promotion:
TCS Dealers

CHANNEL:

IWD

REBATE:

October 1, 2021 - December 31, 2021

PUBLICATION:

Version 2 - 10/5/2021

OWNER:

Steve Adams

PURPOSE

Trane is proud to announce the National Promotion for Fall 2021. Based on feedback from Ferguson and dealer communities, we are pleased to make it easier for Dealers that purchase residential **(non-RNC/NOO)** equipment.

Trane will provide a Rebate on Qualifying Equipment not purchased on Quote.

PROMOTIONAL OFFER

Homeowners receive up to \$1000 in instant rebates on homeowner purchases of Qualifying Equipment.

See Exhibit A of this document for models and combinations approved for use in this offer. Dealers may receive multiple instant rebates for multiple homeowner purchases per Qualifying Equipment in Exhibit A.

These offers cannot be combined with RNC/NOO quoted pricing or any other national Trane consumer offer.

EFFECTIVE PERIOD

Instant Rebate

- Purchase Period: *October 1 – December 31, 2021*
- Claims Submission: *October 5 – Jan 10, 2022*
- Last Day for Ferguson to Amend, Correct, or Edit claims: *January 10, 2022*





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ELIGIBLE PARTICIPANTS

Ferguson and their participating independent Trane Comfort Specialist (“TCS”) Select, Prime & Premier Dealers are eligible to participate in this Plan provided:

- Participating independent Trane TCS Dealers (hereinafter “Dealer”) must have a signed 2021 Dealer Sales Agreement or other signed, current, and active Dealer Sales Agreement on file with Ferguson and be in good standing with Ferguson.
- Qualifying Equipment returned during this period may cause a reverse Debit Memo of any paid rebate; and
- Rebates in this offer are not available if RNC/NOO quoted pricing is utilized when purchased from Trane; and
- All installations must be located in the United States.





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QUALIFYING EQUIPMENT

Only Qualifying Equipment as defined in this Sales Plan is Qualifying for the above-stated rebate. All offers are based on product availability. No substitutions or exceptions will be granted.

Qualifying Equipment for rebates under this Plan:

- Systems (Qualifying Outdoor unit + matching Furnace or Air Handler + Nexia® control as listed in Exhibit A);
- Components (Furnace + any thermostat; or Package Unit + Nexia control as listed in Exhibit A)

Please refer to Exhibit A in this plan for specific Qualifying Equipment by model number.

Nexia® connected controls under this Plan are:

- TCONT724
- TCONT824
- TCONT850
- TZON1050



- Dealer sales to a builder without a direct homeowner purchase at the time of sale do NOT qualify under this plan.
- This offer is NOT valid on installations for commercial purposes. Qualifying Equipment must be installed at a residence.
- Homebuilder or contractor-quoted purchases for new construction, multi-family, non-owner occupied or any other special instant rebate program do NOT qualify and will be declined.
- Must be residential equipment. Commercial equipment does NOT qualify.
- Substitutions using American Standard components are NOT allowed and will not be reimbursed.



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ADVERTISING

To build your own ad for this offer, Trane logos and ad building are available in MAX.

ComfortSite > Marketing Center> MAX > Info Center

To download Ad Images:

- **MAX > Image Library**
- On the left side, find **Ad Images**
- Under **Ad Images**, select the subcategory **Promotional**

*Customizable (add your logo/contact information) Newspaper and Direct Mail templates, billboards, and digital banner ads can be found under **Create An Ad**, located at the top left in the toolbar at the top in MAX (see below).*



Advertising materials are available in pre-written or customizable form through ComfortSite > Marketing Center > MAX

- All advertising for this Plan must adhere to the guidelines defined herein and by the Distributor. Advertising that does not follow these guidelines will NOT be eligible for Trane funding.
- All advertising must include plan sales dates. This may be in the body of the ad or the disclaimer.
- Dealers are encouraged to use the pre-approval review process within MAX to ensure co-op eligibility prior to placing the advertisement.

DISCLAIMER

PROMOTIONS WITH INSTANT REBATE MENTION

**See your participating independent Trane Dealer or visit Trane.com for complete program eligibility, dates, details and restrictions. Available through participating independent Trane Dealers. Special rebates from \$100 up to \$1000. All sales must be to homeowners in the United States. Void where prohibited. Valid on Qualifying Equipment only. Offer expires 12/31/2021.*



DEALER ADMINISTRATION NOTES/ADDITIONAL NOTES

All rebate claims must be submitted by Ferguson via claim form. No credit will be given for claims received after the Submission Deadline.

- Offer ALL components of this Sales Plan to the consumer.
- Ferguson purchases equipment from Trane through the normal process utilizing existing pricing.
- Ferguson is responsible for funding 50% of the total consumer instant rebate as shown in Exhibit B. The remaining 50% is funded by Dealer.
- Dealers will receive a credit memo for 50% of the instant rebate upon approval of claims.
- Example: XV19 system is purchased by homeowner from Dealer.
 - Instant rebate is \$1000
 - Claim is reviewed and processed.
 - Dealer receives credit memo for 50% of the instant rebate amount. Ferguson is responsible for remaining 50%. Ferguson provides \$500 credit to Dealer.
- All Qualifying Equipment sales dates must be during the Purchase Period, or claim will be denied.
- Trane & Ferguson reserves the right to request additional information to validate a claim and inspect any installation that is part of this program.
- All instant rebate claims will be validated on:
 - Approved participating TCS Dealer
 - Sales Date
 - Qualifying Equipment
 - Valid/non-duplicated serial numbers
- Agree to abide by all Sales Plan parameters and will only be reimbursed for claims following these guidelines.

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EXHIBIT A

Trane Qualifying Equipment for Instant Rebate: Qualifying System Combinations for 2021 Fall Promotion for TCS Dealers

ELIGIBLE SYSTEM COMBINATIONS FOR 2021 FALL PROMOTION									
Instant Rebate	Outdoor Unit		Furnace					Air Handler(s)	Required Control
			S Series	XC95(m)	XC80	XV80	ULN		
\$800	XV20i System 4TTV0; 4TWV0	+	S9V2; S9V2-VS	TUHM; TDHM	TUD2-C; TDD2-C		L8V1	TAM9; TEM8; POV0	Trane Home Control
\$1,000	XV19 System 4TWL9		S9V2; S9V2-VS	TUHM; TDHM	TUD2-C; TDD2-C		L8V1	TAM9; TEM6; POV0	
\$800	XV18 System 4TTV8; 4TWV8		S9V2; S9V2-VS	TUHM; TDHM	TUD2-C; TDD2-C		L8V1	TAM9; TEM6; POV0	
\$500	XL18i System 4TTX8; 4TWX8		S9V2; S9V2-VS; S9X2; S9X1; S8X1; S8X2	TUHM; TDHM	TUD2-C; TDD2-C	TUD2-V; TDD2-V	L9X1; L8V1	TAM9; TEM6; POV0	
\$300	XR17 System 4TTR7; 4TWR7		S9V2; S9V2-VS; S9X2; S9X1; S8X1; S8X2	TUHM; TDHM	TUD2-C; TDD2-C	TUD2-V; TDD2-V	L9X1; L8V1	TAM9; TEM6; POV0	

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Trane Qualifying Equipment for Instant Rebate: Qualifying Components for 2021 Fall Promotion for TCS Dealers

ELIGIBLE COMPONENTS FOR FALL PROMOTION		
Instant Rebate	Packaged Units	Required Control
\$1,000	XL16c Packaged Units 4YCZ6; 4WCZ6;	Any Trane Home Control
\$600	XL15c Packaged Units 4YCY5; 4WCY5	
Instant Rebate	Furnace	Required Control
\$100	S9V2; S9V2-VS; TUHM; TDHM; L8X1; L9X1; L8V1	Any Control

*4TTV0 and 4TTV8 requires BAY24VRPAC52 Relay Panel + S9V2
^Nexia® Controls are: TCONT724, TCONT824, TCONT850, TZON1050





Products are Qualifying based on availability and must be sold/installed/claimed during the Effective Period. No substitutions or exceptions are allowed. Eligibility based upon Trane comfort system configuration and use of Trane products.

Substitutions using American Standard components are not allowed and will not be reimbursed.

EXHIBIT B

INSTANT REBATES AND CONTRIBUTION AMOUNTS

Model Family	Instant Rebate	TCS Dealer Contribution	IWD Contribution
XV20i System	\$800	\$400	\$400
XV19 System	\$1,000	\$500	\$500
XV18 System	\$800	\$400	\$400
XL18i System	\$500	\$250	\$250
XR17 System	\$300	\$150	\$150
XL16c Packaged System	\$1,000	\$500	\$500
XL15c Packaged System	\$600	\$300	\$300
Furnace-Only Component	\$100	\$50	\$50

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LEGAL REQUIREMENTS

THIS DOCUMENT CONTAINS CONFIDENTIAL, PROPRIETARY OR TRADE SECRET INFORMATION OF TRANE U.S., INC. IT MAY NOT BE DISCLOSED TO ANY THIRD PARTY WITHOUT PRIOR WRITTEN CONSENT FROM TRANE U.S., INC. OR ITS AFFILIATES. DISTRIBUTOR/DEALER MAY BE LIABLE FOR ANY UNAUTHORIZED DISTRIBUTION.

The information provided herein is considered confidential and proprietary information of Trane U.S., Inc., and its affiliates ("Trane"). It is provided for the sole purpose of permitting the recipient to promote Trane products and services. Recipient agrees to maintain the confidentiality of all proprietary, trade secret information, including confidential pricing data provided in this document. The Recipient hereby agrees that it will not at any time disclose this confidential information or material, in whole or in part, to any person or entity for any reason or purpose whatsoever, unless Trane gives its consent, in writing, to such disclosure, except as required by law. The agreement to maintain the confidentiality of this information extends to any employees, pre or future, involved in the work desired and who will have access to the information. These employees will hold the information in confidence in accordance with this agreement and use the information only in the performance of their employment. Recipient agrees to review this agreement and its terms with employees and will obtain their agreement with the terms of this agreement before providing them with any Trane confidential information.

Amendments, Modifications, or Exceptions

Trane reserves the right to amend, modify, or cancel the program, or any portion at any time. Amendments are not effective unless they are published by Trane in formal Guidelines or are signed by an authorized Trane representative. Any exceptions to the program guidelines must be approved in writing by an authorized Trane representative.

No Other Obligation

Trane shall have no fiduciary duties or other special duties of any kind to any distributor/dealer under the program other than as expressly set forth in these guidelines.

Legal Liability

By participating in this program, each participating distributor/dealer warrants that its marketing programs and initiatives are in compliance with all antitrust pricing laws and federal/state/local regulations. Trane does not undertake any legal responsibility for the local management and execution of their marketing programs.

Document Retention

It is the distributors/dealers responsibility to maintain copies of supporting documentation and claim reimbursement paperwork for a minimum of 24 months after reimbursement. Prior to implementing any change in your record retention policies, please consult with your accountant and attorney to determine whether you need to retain these records for other business or legal purposes.

Claims Auditing

All reimbursements under the program are subject to audit. If reimbursement is received on any claim that is later determined to be ineligible, the distributors/dealers account will be either be debited or invoiced in the amount of the ineligible claim plus reasonable and customary expenses incurred for conducting the audit.

Program Violation

Violation of these guidelines may result in termination of the applicable Distributor Agreement or Dealer Sales Agreement or any portion thereof, including but not limited to an immediate revocation of any and all rights to use or display Trane intellectual property (logo's, trademarks, creative).

Financial Status

Eligibility for program and reimbursements are contingent upon Distributor/Dealer having an executing Distributor Agreement or Dealer Sales Agreement on file and their account being active and in good standing/current as determined solely by Trane.

Privacy Policy Disclosure Statement

As part of this program and within Trane's sole discretion, Trane collects various information to support its development and delivery of quality products, services, and programs to its consumers. In order to ensure that Trane programs are provided and that proper quality in service is achieved, Trane may from time to time directly contact homeowners who purchase Trane products or services to survey customer satisfaction, to evaluate homeowner's reactions to an interest in Trane products and services, and to conduct research activities. These surveys are a result of such things as independent dealer programs, product registrations, extended warranties, etc. and may be provided to you for the homeowner's future purchase of Trane products and services. Any information received or obtained by Trane will be held in accordance with Trane's privacy policy, which may be obtained at www.trane.com. Trane may from time to time also directly contact homeowners when requested by the homeowner, when required by contract or law, or when a registered homeowner has not received all available coverage for its Trane products.

Termination: *This sales plan is subject to termination or modification at any time by Trane.*