



*It's Hard To Stop A Trane.®*

# 2023 Trane Distribution Ownership Plan

Channel: DSO | Owner: Emma Carter | Effective: 1-1-2023

## Purpose

This program is intended to provide an incentive for DSO Trane Dealers and their Key Employees to install top of the line Trane products in their personal residence or in the Dealer Principal's Business Showroom in order to experience or display the superior comfort and quality of our systems.

### EFFECTIVE PERIOD

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Sales must be completed during the following time period: January 1, 2023 – March 31, 2024. Equipment must be purchased, installed, and discount applied during this effective period.

### ELIGIBLE PARTICIPANTS

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All Trane Dealer Principals and their Key Employees (employees designated by the Trane Dealer Principal and approved by the local Trane DSO) are qualified to participate in this incentive program (the "Plan"). Key Employees of the Trane Dealer Principal must be specifically engaged in the sale, service or installation of Trane products. Key Employees must be full-time employees and have been employed by their present employing Dealer for a period of at least six (6) months preceding a transaction under this Plan.

The Dealer's account must be current and Dealer must have a 2023 Dealer Sales and Service Agreement or other signed, current, and active Dealer Sales Agreement (or a Trane Dealer Sales and Service Agreement that is still in effect during the Effective Period) on file with their local Trane DSO. The dealer must be in good standing with the distributor.

### ELIGIBLE EQUIPMENT

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See the Eligible Equipment chart found later in this document for specific products.

### CONDITIONS

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This incentive will be given based on the following criteria and subject to the following conditions:

- The installation and start-up of Trane Eligible Equipment purchased under the terms of this Plan (maximum two systems per home) must be performed by a Trane dealer.
- Only one (1) incentive submission per Participant per five (5) years will be given.
- The Eligible Equipment must be installed in the Eligible Participant's personal residence or in the Dealership's retail showroom. Eligible Equipment is nontransferable.

The Trane Dealer who is purchasing the Eligible Equipment needs to complete and submit the attached Distribution Ownership Claim Form to the local Trane DSO prior to ordering, so proper pricing can be submitted at time of order placement. However, a credit against a prior billed invoice can also be issued after the fact if the dealer submits a copy of their invoice with the claim form.

The Distribution Ownership Claim Form must be approved and executed by the local Trane DSO before any price discount will be accepted and applied.

This special offer cannot be used with quoted pricing or in conjunction with any other consumer program or reduced price.

All Plan claims are subject to being audited at the sole discretion of Trane. Further, at Trane's discretion, Trane may seek verification from Eligible Participants that Eligible Equipment has been installed in Eligible Participant's personal residence or the Dealership's retail showroom.

## Distribution Ownership Program

### ELIGIBLE EQUIPMENT

SPLIT OUTDOOR UNITS	DESCRIPTION	DISCOUNT
4TTV0 / 4TWV0	XV20i	35%
4TWL9	XV19	30%
4TTV8 / 4TWV8	XV18	30%
4TTX7 / 4TW7 or 4TTX8 / 4TWX8	XL17i or formerly XL18i	25%
4TTX5 / 4TWX5 or 4TTX6 / 4TWX6	XL15i or formerly XL16i	20%
4TTR6 / 4TWR6 or 4TTR7 / 4TWR7	XR16 or formerly XR17	20%
4TTR5 / 4TTL5 / 4TTL6 or 4TWR5, 4TWL5 / 4TWL6	XR15	15%
4TTR4 / 4TWR4	XR14	10%
4TTR3	XR13	10%

COILS	DESCRIPTION	DISCOUNT
4TXC / 4PXA / 4PXC-U / 4PXC-D	Premium Coils	10%
4MXC	Value Coil	10%

AIR HANDLERS	DESCRIPTION	DISCOUNT
TAMX	Hyperion	20%
TAM9	Hyperion	20%
GAM5	Hyperion	15%
Phased Out: GAF2	Hyperion	10%

<b>TEM8 / TEM6/ TEM4</b>	M-Series	10%
<b>TMM4/ TMM5</b>	TMM-Series	10%

<b>FURNACES</b>	<b>DESCRIPTION</b>	<b>DISCOUNT</b>
<b>TUHM / TDHM</b>	XC95m	25%
<b>TUDC / TDDC</b>	XC80	20%
<b>TUD2V / TDD2V</b>	XV80	20%
<b>S9V2-VS</b>	S9V2-VS	20%
<b>S9V2</b>	S9V2	20%
<b>S8V2C</b>	S8V2-C	15%
<b>S9X2</b>	S9X2	15%
<b>S9X1</b>	S9X1	15%
<b>S8X1</b>	S8X1	15%
<b>S8X2</b>	S8X2	15%

<b>PACKAGED UNITS</b>	<b>DESCRIPTION</b>	<b>DISCOUNT</b>
<b>4WCZ6 / 4DCZ6 / 4YCZ6</b>	16 SEER	25%
<b>4WCZ5 / 4DCZ5 4YCZ5</b>	15 SEER2	25%
<b>4TCY5 / 4CY5 / 4WCY5 / 4DCY4</b>	15 SEER / 14 SEER	20%
<b>4TCC4 / 4YCC4 / 4WCC4 / 4DCY4 / 4WHC4</b>	13.4 SEER2	15%

<b>ADD-ON ACCESSORIES</b>	<b>DESCRIPTION</b>	<b>DISCOUNT</b>
<b>TLINK360/TZON1050/ TZONE1040 / ZZONEPNL</b>	Controls	20%
<b>ZZONEEXP / BAYVRP / ZDAMP</b>	Accessories	20%
<b>ZSENS930</b>	Remote RTH Sensor	20%
<b>TCONT850AC52UA</b>	XL850	20%
<b>TCONT824AS52DA</b>	XL824	20%
<b>TCONT724AS42DA</b>	XL724	20%
<b>EFD / TFD</b>	CleanEffects™	25%
<b>EERVR100 / EERVR200 / EERVR300</b>	FreshEffects™ Energy Recovery Ventilators	15%
<b>EVENQF130V</b>	Envirowise™ Ventilator	15%
<b>EHUMD800A / EHUMD800LC</b>	Envirowise™ Humidifiers	15%
<b>EDHUM70V / EDHUM098</b>	Envirowise™ Dehumidifiers	15%
<b>EQBFM</b>	QuickBox™ Media Cabinet	15%

<b>RUNTRU</b>	<b>DESCRIPTION</b>	<b>DISCOUNT</b>
<b>RunTru Ductless</b>	All Single and Multizone systems	30%
<b>Ducted Split Systems</b>	All air conditioning, heat pumps, air handlers, and furnaces	10%

<b>TRANE MITSUBISHI</b>	<b>DESCRIPTION</b>	<b>DISCOUNT</b>
<b>Trane Mitsubishi equipment, excluding accessories (Accessories not included in discount)</b>	All METUS Equipment	10%

## Administration

### DEALER

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To receive credit for Trane Eligible Equipment sold and installed in the Dealer Principal's personal residence or the residence of eligible Key Employees, the Trane dealer purchaser must complete and submit the attached Distribution Ownership Claim Form to the local Trane DSO prior to ordering, so proper pricing can be submitted at time of order placement, however, a credit against a prior billed invoice can also be issued after the fact if the dealer submits a copy of their invoice with the claim form.

### DSO

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When creating quote request, the complete name of the person receiving the product must be entered on the Project Name line after the letters VIP.

## 2023 Distribution Ownership Form

Dealer Name: \_\_\_\_\_

Oracle Number: \_\_\_\_\_

Worksheet Number: \_\_\_\_\_

**Form to be completed by equipment purchaser:**Equipment being purchased by (*check one*): ☐ Dealer Principal ☐ Key Dealership Employee ☐ Dealer Showroom

Purchaser Name: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Equipment Requested: Model Numbers	Description

By signing below, the purchaser certifies that all information in this form is correct and the Trane equipment requested is to be installed on their primary residence for personal use, or for demonstration purposes at the dealerships retail showroom.

Signatures	Printed Name	Date
Purchaser:		
Dealer Principal:		
DSO Manager:		

*Completed Original Form Retained at DSO*

## 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 applicable laws, including 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. Except for the implied warranty of title and the warranties contained in Trane's printed product warranty, no other warranties, whether oral, statutory or implied, including specifically and without limitation the implied warranty of merchantability and fitness for a particular purpose, shall apply to the products. Trane's liability in respect to said products shall be limited to Trane's printed product warranty, and in no event shall Trane be liable for incidental, consequential, indirect, punitive or special damages.

### Document Retention

It is the distributor/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 debited 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 a current, unexpired, and executed 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](http://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, but such termination or modification shall not affect rights hereunder with respect to sales or contractual commitments made prior to the time of such termination or modification.



#### About Trane

Trane – by Trane Technologies (NYSE: TT), a global climate innovator – creates comfortable, energy efficient indoor environments for commercial and residential applications. For more information, please visit [www.trane.com](http://www.trane.com) or [www.tranetechnologies.com](http://www.tranetechnologies.com)

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