



Distributor Partner Meeting



April 29th & 30th
Chicago, IL

Agenda (April 29th)

- Introduction - TVH
- State of the Industry – Todd Graf
- Future of Utilities Thoughts - TVH
- Consumer Awareness – Scott Stayton
- Break
- Marketing Support & Contacts – Matt Muhlada
- Customer Service & Tech Support – Marci Ware
- ClimateMaster Consumer Website – Scott Stayton
- Technical Training – Sean Hogan / Mike Hammond
- Cocktails, Dinner, & Awards

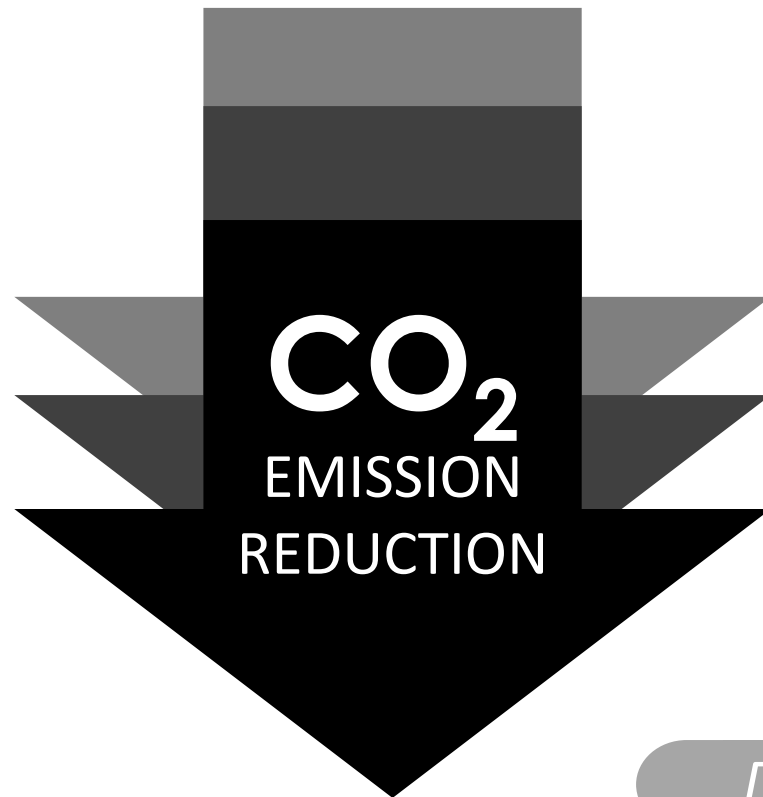
Re-Newed Impact to Make Your Business More Profitable





**Thank you to our
Distributor Business
Partners**

2019 ClimateMaster Sustainability Award



Derived from 2017 and 2018 Totals

State of the Industry



Todd Graf
President -ClimateMaster

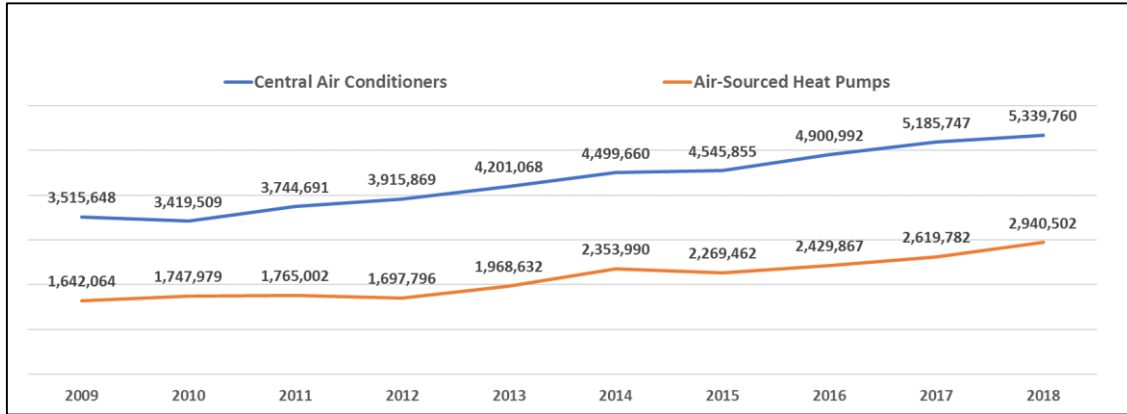


- LSB to NIBE Transition
- Federal Tax Credit Disruption
- Climate Control Group Reorganization

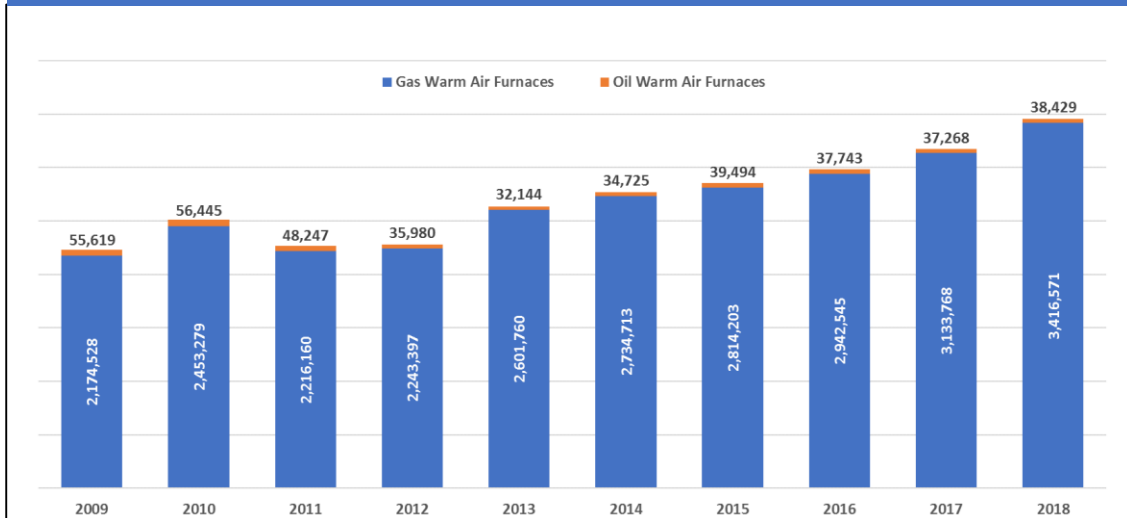
THANK YOU!

Geothermal Down in Growing Market

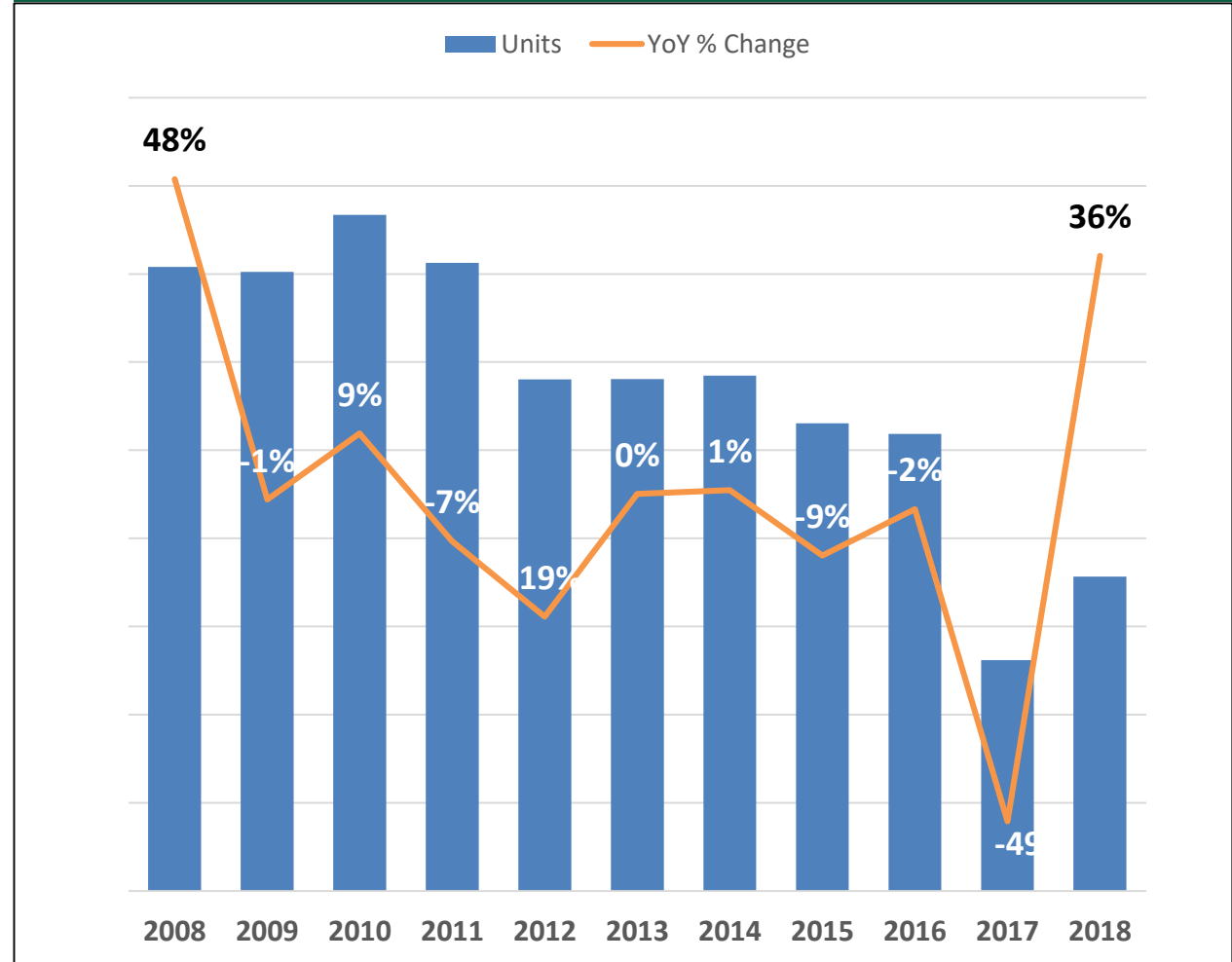
Residential Central Air Conditioners and Air-Sourced Heat Pump Yearly Volumes (AHRI Reports)



AHRI Furnace Sales – Gas & Oil



GEO Shipments - Year over Year Change



- Advocate for the Industry
 - Geothermal Exchange Organization (GEO)
 - Federal Tax Credits
 - State Tax Credits
 - Consumer Awareness
 - Utility Engagement
 - Local Policy
 - New York
 - NYSERDA
 - NYGEO

• Stronger Business

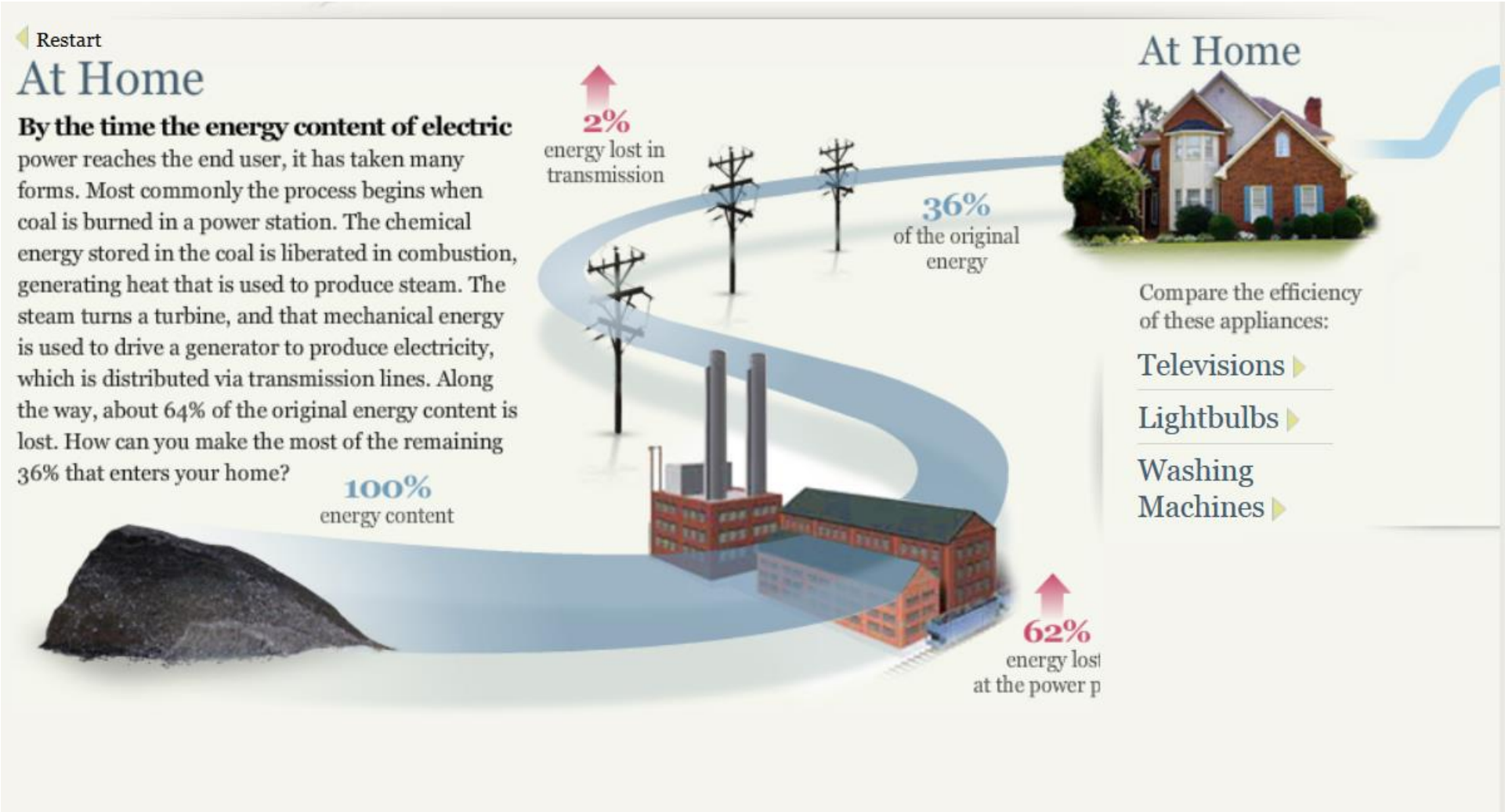
- Build Team
 - Sales
 - Product Management
 - Customer Support
- New Product Development
 - Expand Portfolio
 - Connectivity (IoT)
- Improve Customer Service
 - Timely and Accurate Information
 - Ship Product On-time
 - Reduced Lead-times

- **Our Mission is the Grow our Business**
- **Our Business Partners Critical to Success**
- **We are Committed to Residential Business**

Future of Utilities

Todd Van Hyfte – Director of Sales

Had to Add This...



Utilities are Seeking Answers

Both Electrical and Gas...Focus Upon Heat Pump Technology

Clean Energy Action Plan

New York State is implementing a Westchester Clean Energy Action Plan to provide options for businesses and residents affected by Con Edison's gas announcement.

- Lower energy costs for consumers
- Promote economic development in Westchester County
- Deliver additional resources for new construction projects, energy efficiency awareness, and community support

The \$250 million investment is estimated to reduce energy consumption equivalent to the amount of gas needed to heat more than 90,000 homes.

NYSERDA will enhance incentives for existing programs and create and fund new programs

- **New Construction:** \$28 million in incentives and services will be available to new customers, including low- to moderate-income residential developments and waitlisted natural gas customers, to access alternative heating and cooling systems and energy efficiency services.
- **Energy Efficiency:** \$25 million in investments to implement energy efficiency measures for existing customers in Westchester to reduce overall peak demand constraints.
- **Community Outreach:** A consumer awareness campaign will help communities, businesses, and individuals access the available programs and incentives to help them heat their homes with clean resources and reduce energy waste.

NYPA will provide additional financing services for its customers in Westchester

Ground source heat pump (GSHP) systems heat and cool by transferring thermal energy from the ground to a building without any harmful emissions or additional fuel

Commercial and Multifamily Buildings

- **Increasing incentives** by 25% equating to \$1,500/ton in natural gas constrained areas. Customers can receive up to \$5 million per project.
- **Free Screening** tool and report to assess the potential electrification of buildings 25,000 square feet and larger in natural gas constrained areas.

Residential Homes

- **Increasing incentives** by 25% equating to \$1,875/ton in natural gas constrained areas. An average single family home will receive approximately between \$7,500 - \$9,375 of financial assistance.
- **Loan options** (including on-bill financing) are available to help residents finance energy efficiency and renewable energy improvements. Additionally, lower interest rates are offered to low income New Yorkers and those who cannot qualify for traditional financing.



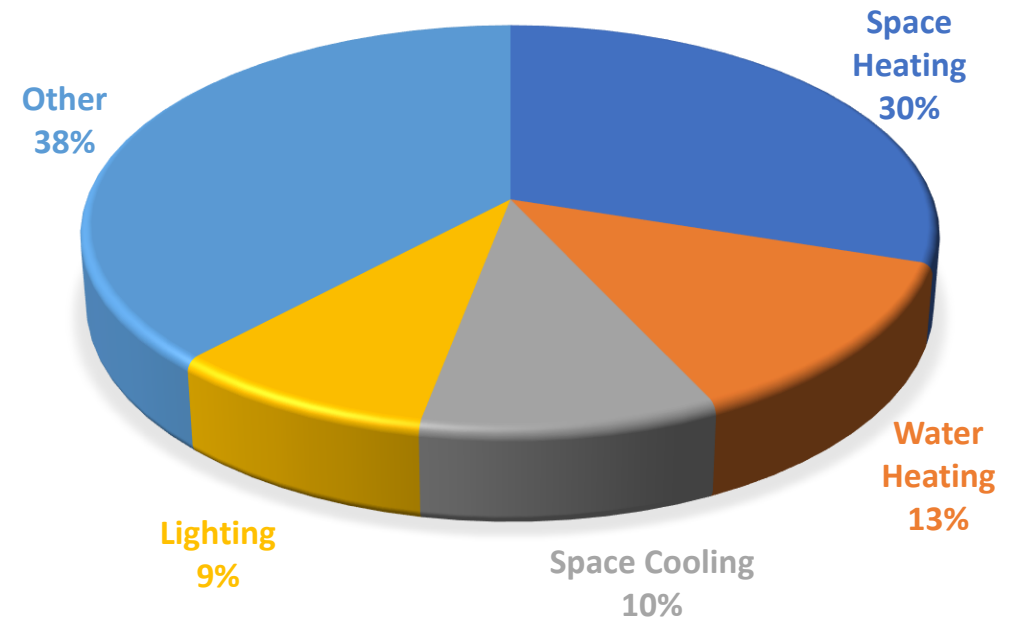
NATIONAL GRID WARNS MORE CUSTOMERS

Newsday's Mark Harrington:

- "National Grid will begin this week notifying the dozens of midsize companies that apply for new natural-gas service each week that it won't be able to supply them
- It's the latest move by the company to highlight its need for a supply project that would increase local gas capacity by 14 percent, easing demand constraints, National Grid says.
- Con Edison has issued similar moratorium alerts.
- The latest letters will include a footnote that tells customers their future service is 'contingent on the successful and timely approval and permitting' of the Northeast Supply Enhancement Project, a \$1 billion pipeline to bring an additional 400 million cubic feet of natural gas per day to the region, connecting to existing infrastructure in the Rockaways."



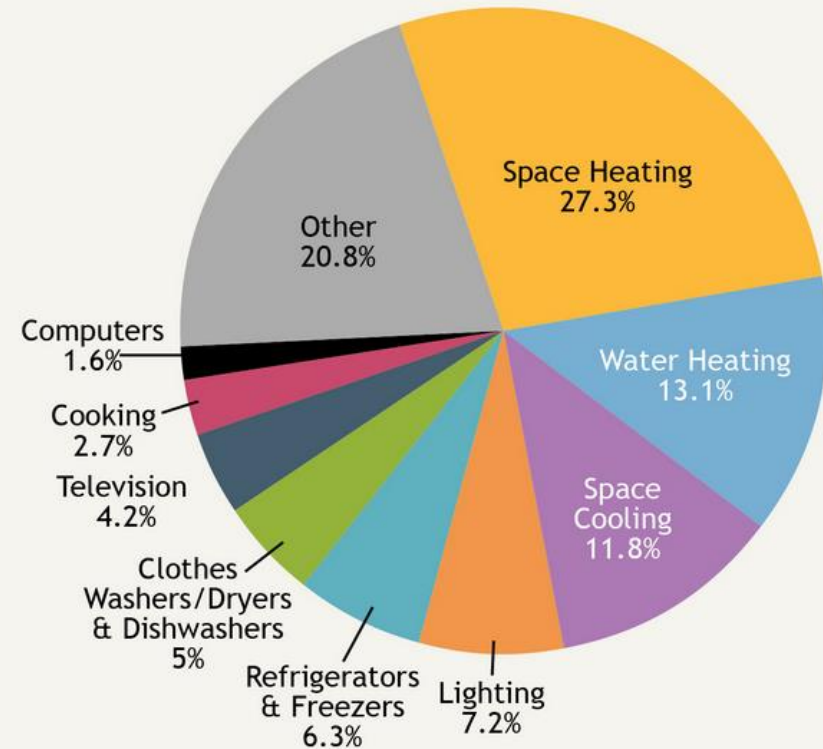
- Residential use accounted for 21% of total U.S. energy consumption in 2015
- The top energy uses in the residential sector were:
 - Space Heating (30%)
 - Water Heating (13%)
 - Space Cooling (10%)
 - Lighting (9%),
 - Appliances (Washer/Dryers; TV's, Computers, Refrigerators, Other)



Comfort accounts for 40% to 53% of total Home Energy Budget

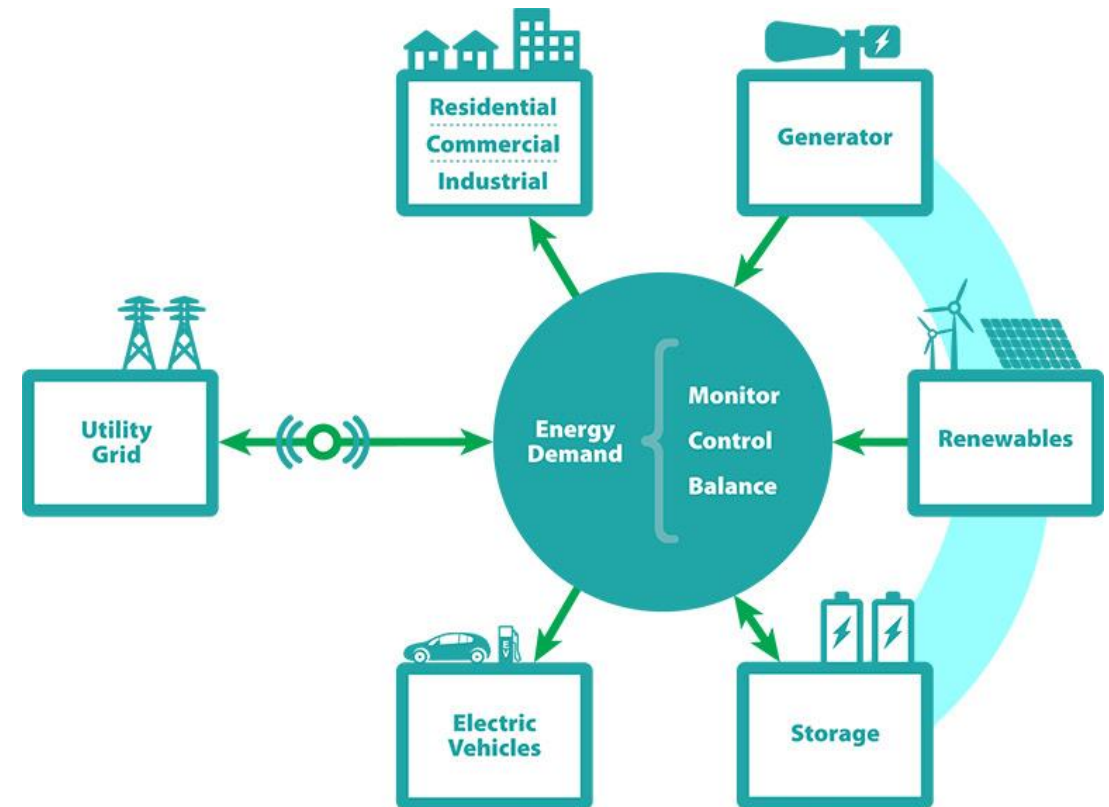
- Current trends indicate that by 2040 residential buildings will consume up to 9% less energy for heating but about 3% more for cooling.
- Electricity will remain the predominant energy source for homes, which will grow in average size from 1,694 square feet to 1,857 square feet.
- Natural gas use will remain nearly constant from 2015 levels, with reductions in space heating but increases in water heating.
- At the same time, cooling degree days, which totaled **1,418** in 2015, are projected at **1,648** in 2040—an increase of about **0.4% per year**.

Energy Usage in the U.S. Residential Sector in 2015



- **Some unconventional technologies** can offer very high efficiencies.
- One prominent example is the [geothermal](#) heat pump. These systems extract heat from underground in winter and make use of relatively cooler underground temperatures in summer
- They are currently expensive: Purchase and installation may be several times the price of conventional heating and cooling systems of equivalent capacity
- According to the U.S. Department of Energy, the cost is offset by energy savings within 5 to 10 years, and system components have typical lifetimes of 25 to 50 years.
- At present, about 50,000 such systems are installed in the United States every year and that rate could change depending on government incentives and market forces.

The Inception of MicroGrids will be evolving..



© Center for Sustainable Energy

- Heating and Cooling is about comfort...Necessary evil
- Do not want unexpected 'costs'
 - Replacement
- Desire ROI
 - Cashflow
- Concerns about environment
- Want to work from tablet, cell phone, computer
 - IoT
 - IoE

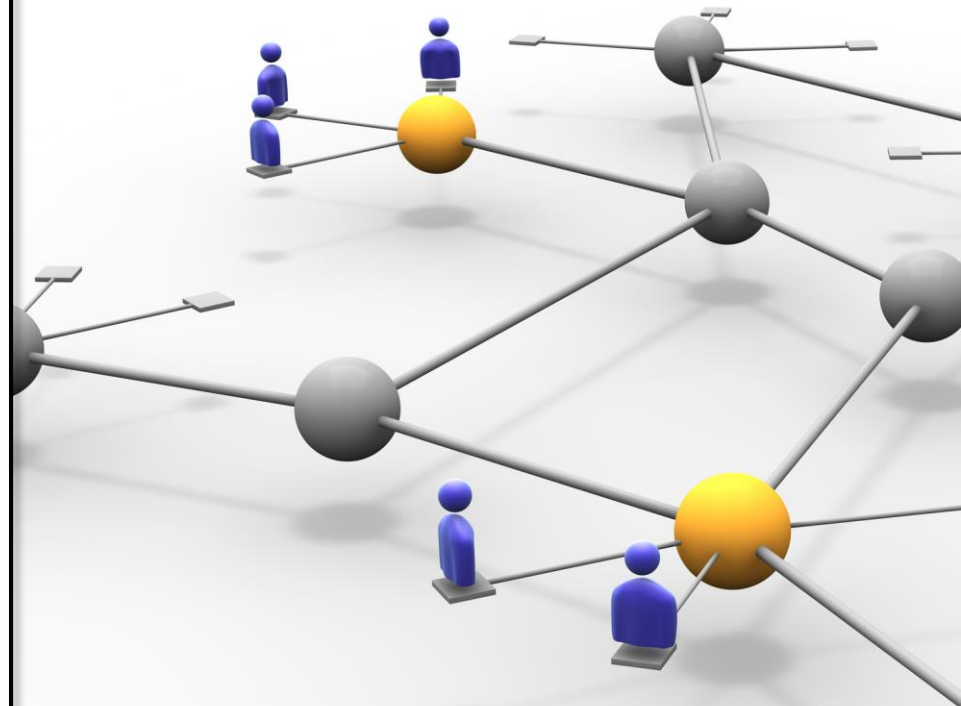
- **Real-Time Monitoring**
- **Predictive Maintenance**
- **Remote Diagnostics**
- **Total Controllability**
- **System Adaptation**
- **Continuous Comfort**
- **Increased Efficiency**
- **Inherent Connectivity**
- **Focus on UX (User Experience)**

Real Time Monitoring

- Internet-connected heating and cooling systems have the ability to continuously monitor conditions and system functionality with the help of smart sensors
- Once information is gathered, it can immediately be shared with system managers, engineers, technicians and so on



- Retrieving the data is one thing – making use of it is where the value lies
- Connected systems are able to
 - Analyze the information they gather
 - Alert others to unusual equipment behavior or system failure
 - Have quicker response times
 - Avoid potentially devastating problems
- Additionally, internet-based systems help reduce maintenance and repair costs over time.



- Think of the waste of resources for dealers to travel to homes and then try to understand the problem
- Without the help of the Internet of Things, a problem must be recognized (in person) and subsequently diagnosed once an analysis has been performed (by a human)
- **A connected system can detect a change or issue and send a notification within minutes of the occurrence**

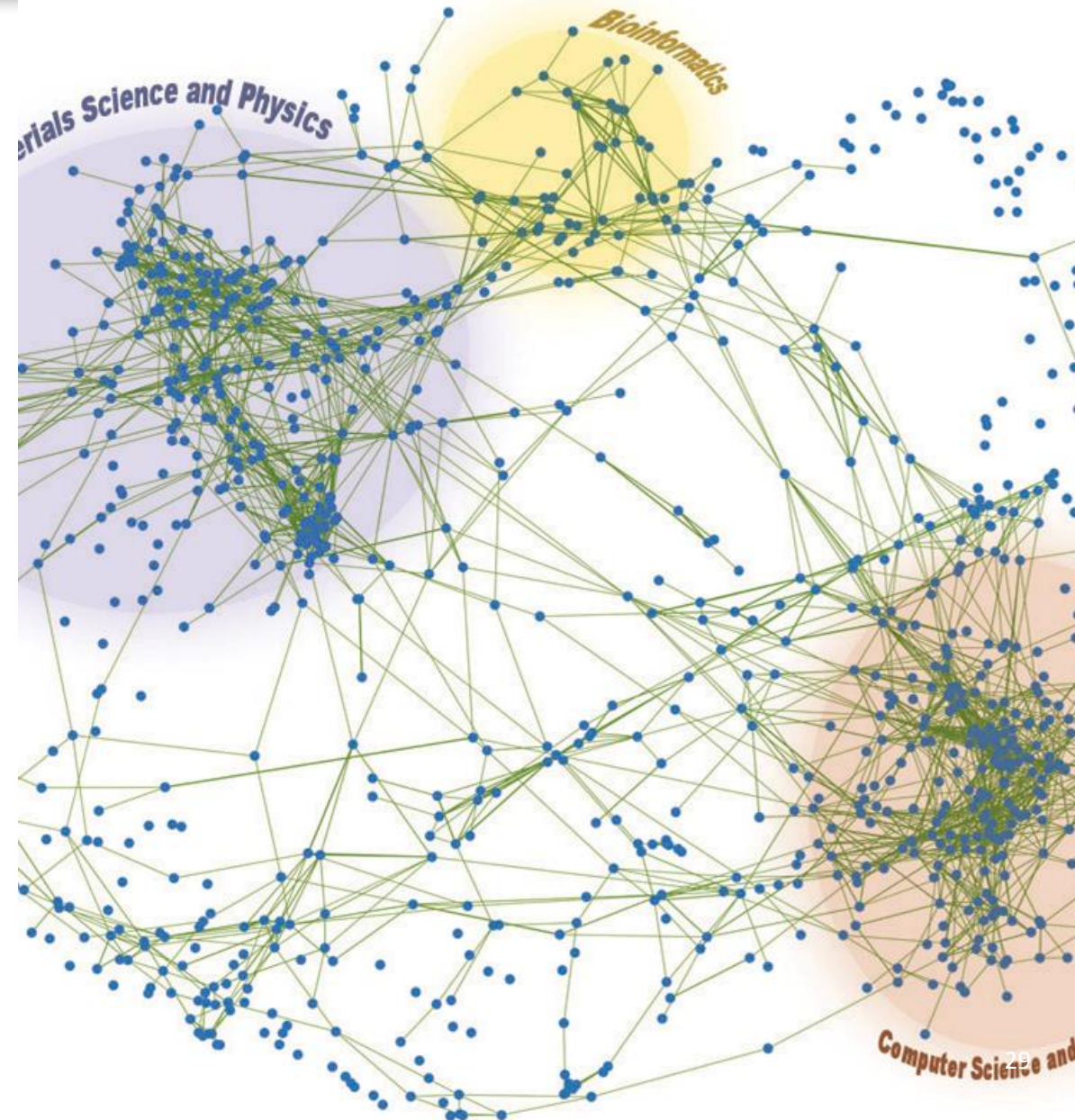


Total Controllability


- Consumers in our soon-to-be-IoT-ridden world don't just want a "smart" system...that's not quite enough
- What they *really* want is total control of their lights, security, appliances, hvac system, garage doors, sprinkler system and many other items
- These days you no longer need to physically touch the systems in your house to manage them

System Adaptation

- Internet-based systems can be entirely controlled by their users, but the coolest part is that they don't *need* to be
- The most advanced systems have actually been designed to adapt to their surroundings like never before
- With the help of smart sensors, systems can measure temperature, humidity and air flow throughout an entire dwelling as well as determine external factors such as the weather forecast and current utility rates
- With this rich information in hand (or in "brain"), **the system adjusts its settings to plan for upcoming situations**, thus boosting efficiency



- Comfort is subjective. However, there *is* some science behind it.
- While you may think a comfortable room is driven solely by temperature, humidity is a major player in this equation. Humidity levels affect the amount of [latent heat](#) present in the air, and that can determine the level of comfort.
- As mentioned in the point above, these web-based systems are incredibly receptive. They observe and learn. They gather information and adapt. Not only are they shooting for optimum efficiency – they're also maintaining a comfortable environment (based on user behavior and external factors) at all times.

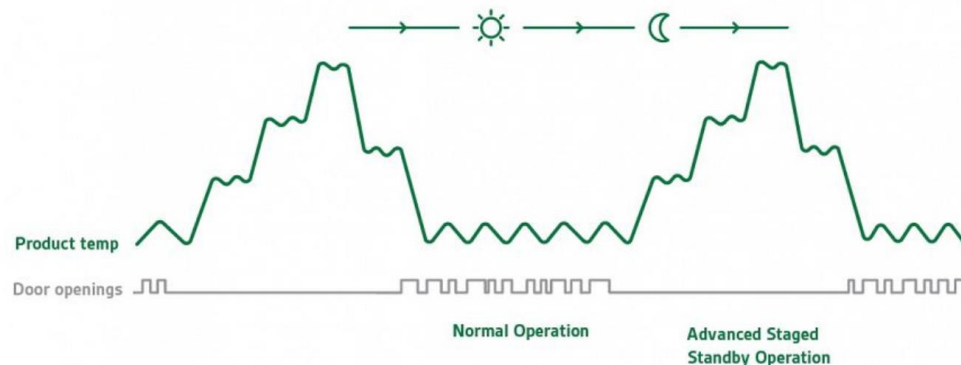


LIFE BEGINS
AT THE END
OF YOUR
COMFORT ZONE

-Neale Donald Walsch

Increased Efficiency

- HVAC units and buildings outfitted with smart, connected sensors simultaneously track both external sources and interior performance to optimize efficiency. Would homeowners like for the ability to reduce their energy another 20 percent by utilizing a technology called "demand response?" Although several factors are fueling the ubiquity of IoT in this industry, the potential energy savings alone are enough to keep the fire fueled.



Smart sensors don't simply pick up clues and collect data. They also enable systems to communicate directly with other systems and devices in a building without the use of a controller. **IoT-capable options are replacing traditional building automation systems (BAS).**



Communication and connectivity are not limited solely to heating and cooling functions. Other systems, including security and lighting, could share a set of occupancy sensors with an HVAC system so all are in sync and communicating seamlessly.



One consideration when it comes to investing in new, connected systems is compatibility with older ones. While integration is possible in many cases, it could be more work than it's worth in the end. Upgrading your entire system to newer, smarter technology is probably your best bet.

Focus on UX (User Experience)

- The technologies emerging today are extremely user-friendly
- Those that gloss over user experience (UX) will not thrive. Period.
- Connected systems are collecting massive loads of data that is then made available to users, so **the ease of accessing and understanding this data is critical.**
- If information cannot be properly digested, then what's the point?
- Good data is timely, accurate and comprehensible.

What To Expect

- ClimateMaster is focused upon GROWING our Residential Presence
 - Greater than the 'GEO' centric focus
 - Investing into
 - Programs to help our Distributor Partners Grow
 - Initiatives to communicate the benefits of Heat Pump Technologies
 - Making our systems applicable with or without government rebates
 - Resources to help our partners
- The combination of Sustainable/Green/Financially Viable Solutions/Energy Efficiency means more money and savings to consumers
- Consumers want options, data, technology and most importantly, CHOICES

Consumer Awareness



Scott Stayton

Marketing Director – Climate Control Group

Situational Overview

- Industry has never made a serious attempt to test advertising
- Total Share of Voice is extremely low
- Competitors outspend us by orders of magnitude to reach consumers



 **mitsubishi
electric**
Changes for the Better

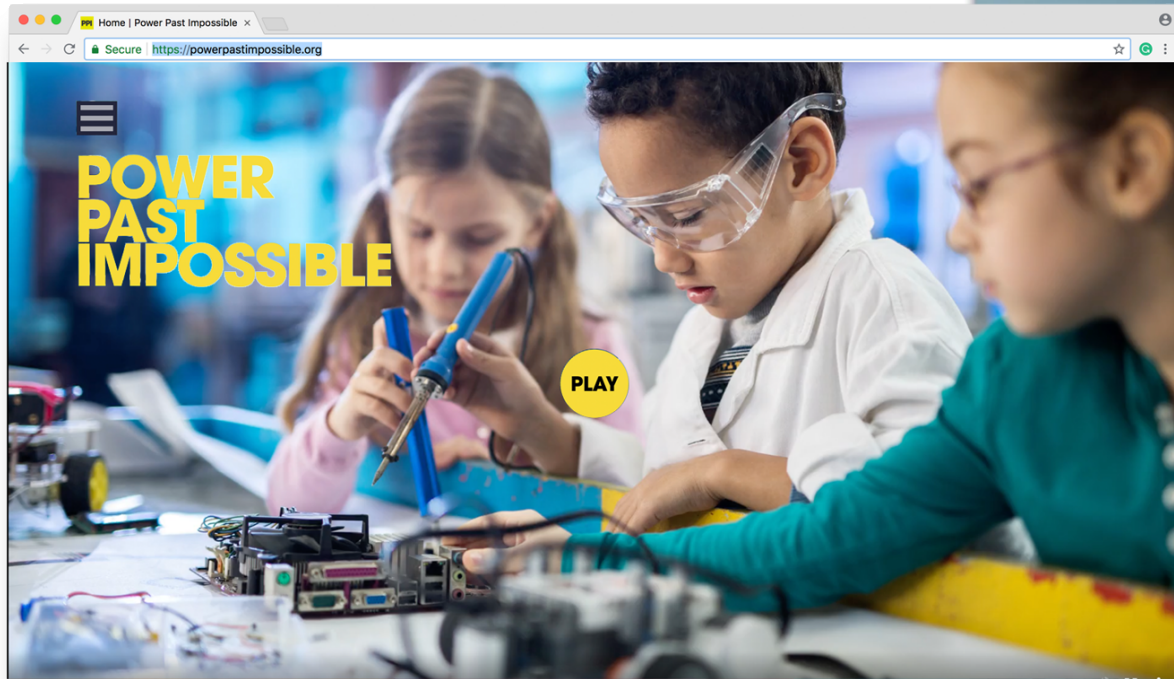


 **TRANE**



POWER PAST IMPOSSIBLE.ORG

- AMERICAN PETROLEUM INSTITUTE -



GSD & M





**POWER
PAST
IMPOSSIBLE.ORG**
- AMERICAN PETROLEUM INSTITUTE -

\$327M
5-yr Advertising/PR

\$37M
5-yr Lobbying

Source:

1 - Time Magazine, *D.C. Influencers Spend More on Advertising and PR Than Lobbying* Retrieved from <http://time.com/3668128/lobbying-advertising-public-relations/>

2 - <https://www.opensecrets.org/lobby/clientsum.php?id=D000031493&year=2012>



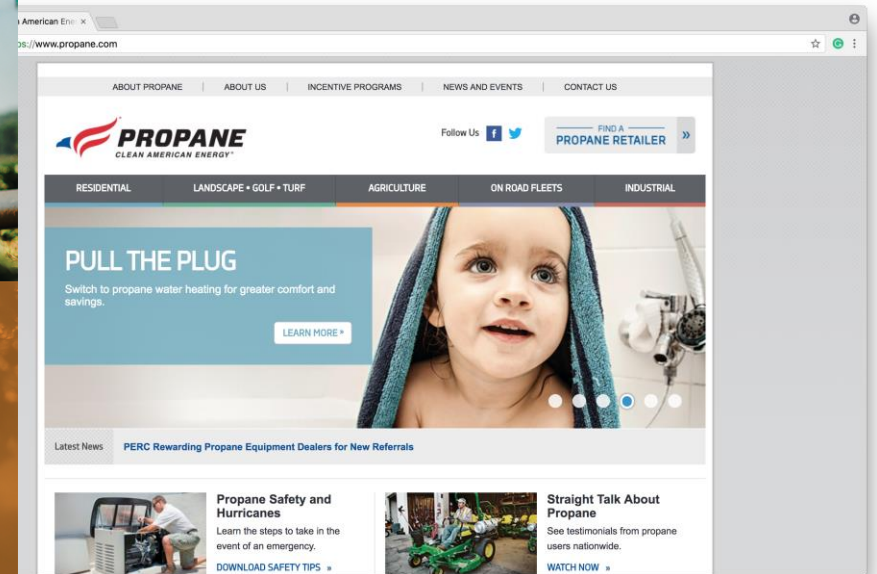
WHO KNOWS WHAT'S BEST FOR AN OPERATION LIKE YOURS? FARMERS LIKE YOU.

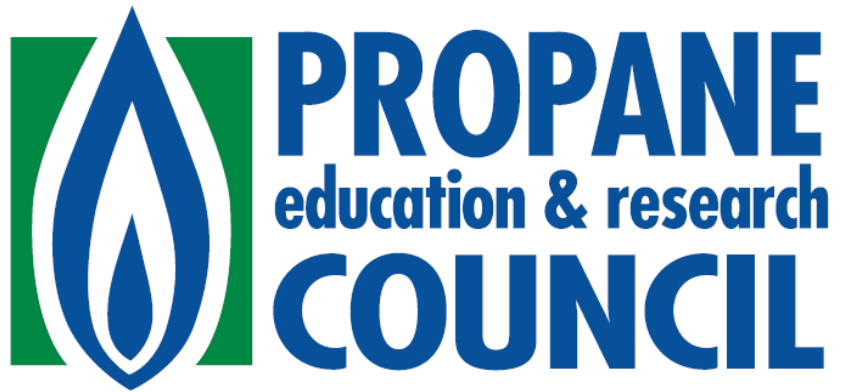
Visit the Georgia Propane Building to experience stories of real farmers utilizing the Propane Farm Incentive Program. You'll also get a firsthand look at the latest in agricultural propane technology and see compelling facts about the advantages of propane-powered farm equipment. With proven results like these, it's no wonder farmers can't stop talking about propane.

PROPANE.COM/AGRICULTURE

LOT C-10
GEORGIA PROPANE BUILDING

PROPANE EDUCATION & RESEARCH COUNCIL

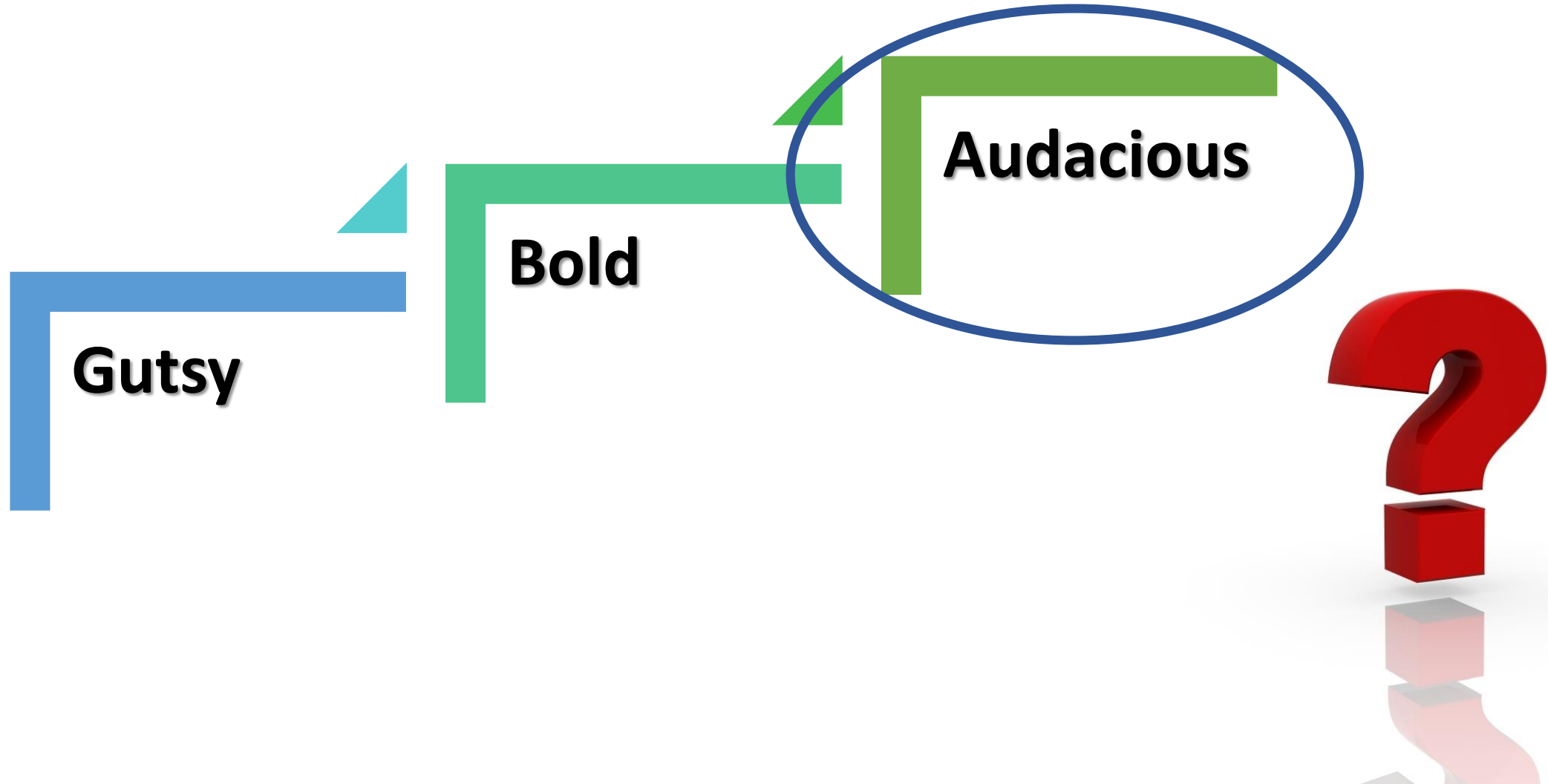




\$11M
2016 Advertising

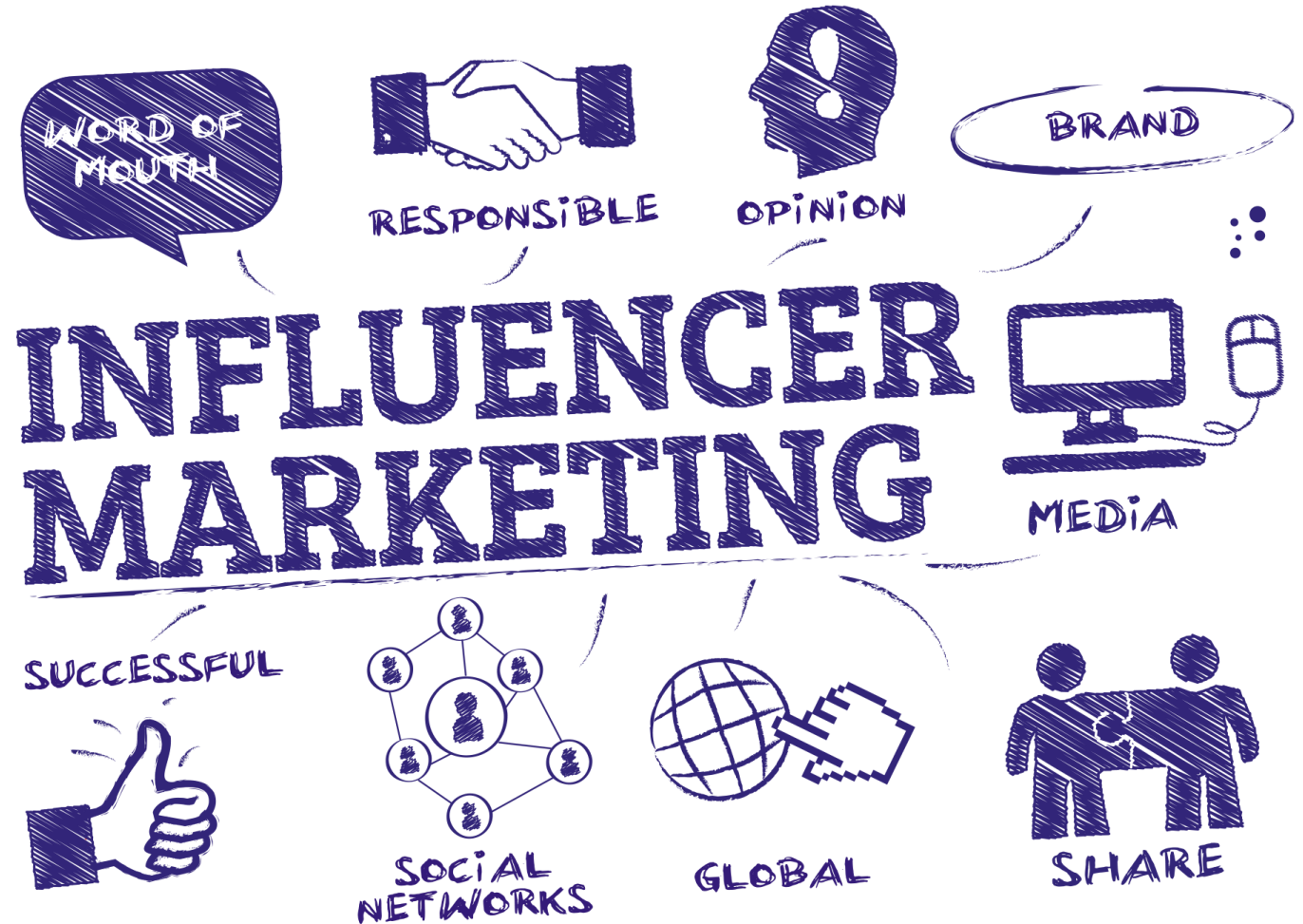
Residential GEO Industry's Challenge

How much effort can we put into awareness?



Generating Awareness

- Paid Search
- Social Media
- Online Publications
- Event/Tradeshow
- Retargeting
- Influencer Marketing
- Online / Live Events
- Public Relations
- TV
- E-mail



Awareness Metrics

- Total Impressions
- Total Reach
- Frequency
- Website visitors
- Mentions
- Search Volume
- Earned Media
- Sentiment
- Message recall
 - Aided
 - Unaided



One of our most important tasks...



True innovation happens when you try to improve something by 10 times rather than by 10%.

How will ClimateMaster & Partners Benefit?

Awareness of
Residential
Geothermal

Driving Traffic to
ClimateMaster &
Partners

Materials
to Share

Lead Generation





www.GEOEXCHANGE.org
MEMBER

Organizational Support Changes



CLIMATEMASTER®

Matt Muhlada



Overview

- Distributor Feedback
- Introspective Look at our Structure
- Process Enhancements
- Teaming for improved responsiveness
- Q and A

Distributor Feedback (2018)

We have been listening...

- What we heard:
 - Unclear where to start with my question...so I call my RAM
 - Inconsistent availability/ Access
 - Unsure what the escalation path is for my issues
 - Many new people... not sure how to connect with them, or what they do
 - Frustrated with lack of communication



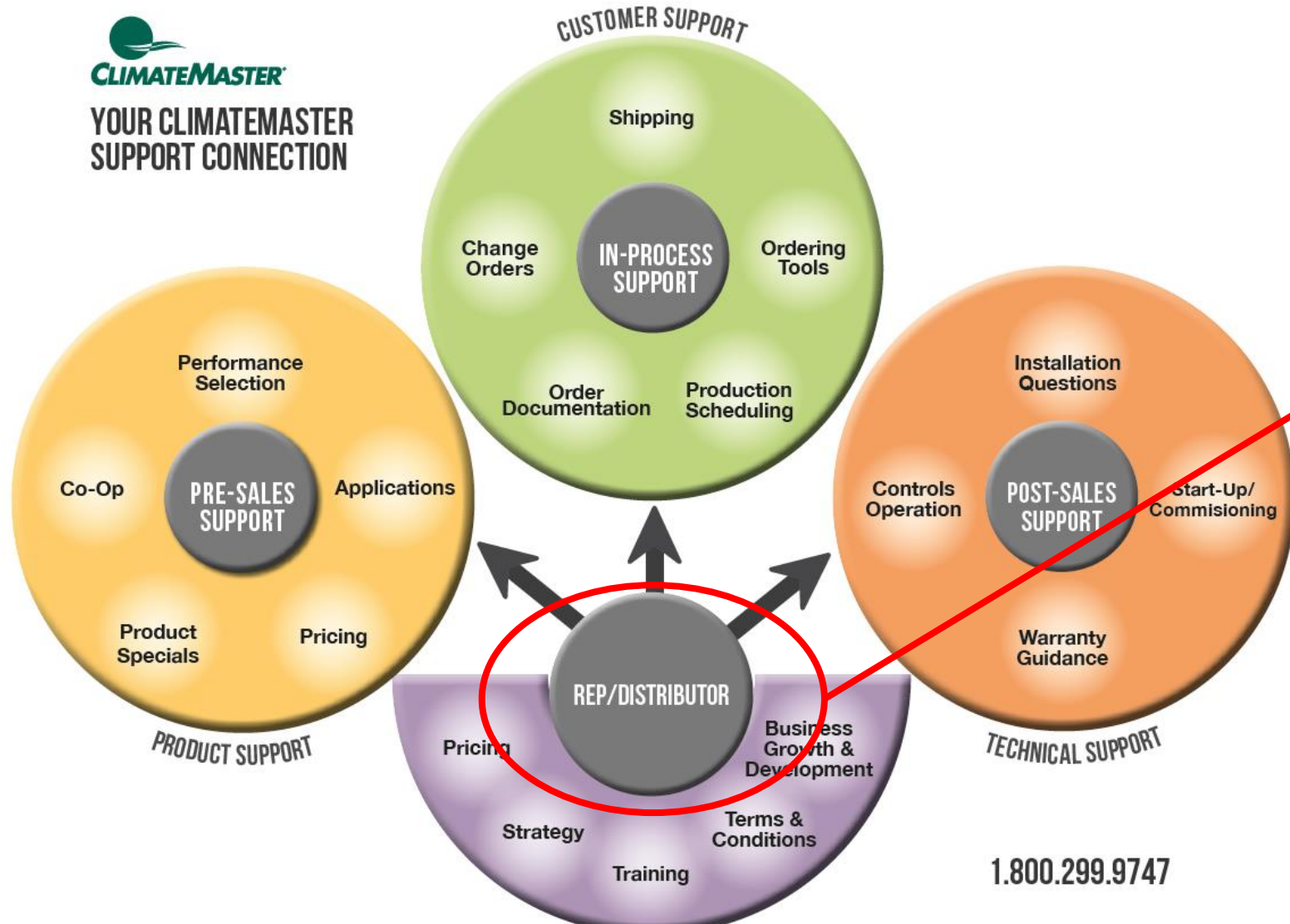
Feedback has been clear and consistent...

“unsure who to go to address my needs, and it is slowing me down”

Situation Assessment (2018)

- Current marketing and sales organization has 12 of 20 positions filled
- Slow attrition over the past few years created...
 - Many functions duplicating efforts (support, data pulling/cleansing)
- Now is an optimal time to re-evaluate the roles and responsibilities
- Senior Leadership team began meeting in March to discuss plans
 - Current state ---> landing on ideal future state
- May 10, 2018
 - After many rounds of review/analysis, this is the output of those meetings

New Support Structure



Center is the Support Target= Distributor/ Mfg. Rep.

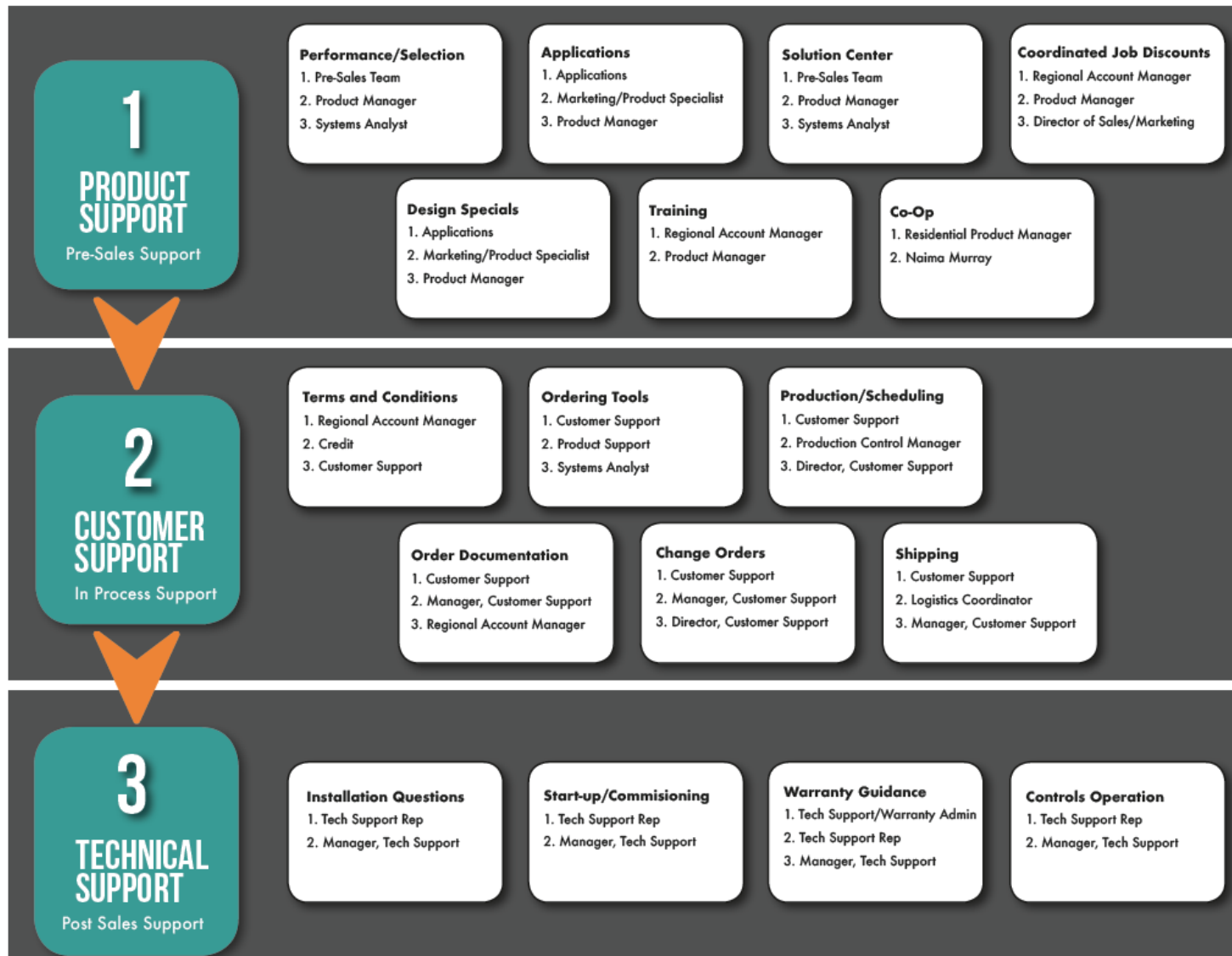
Surrounded by CLM Team

Teams are staffed and "at the ready"

1.800.299.9747

Division of Responsibilities is critical to the success of this plan

Clarified Escalation Path



CLIMATEMASTER CUSTOMER ESCALATION PROCESS

Escalation Process
Implemented in March 2019

Ensuring your questions are supported thoroughly and efficiently

Implementation Timeline



Approval to
Proceed
(June 18)

Finalize
Hiring (Dec
18)

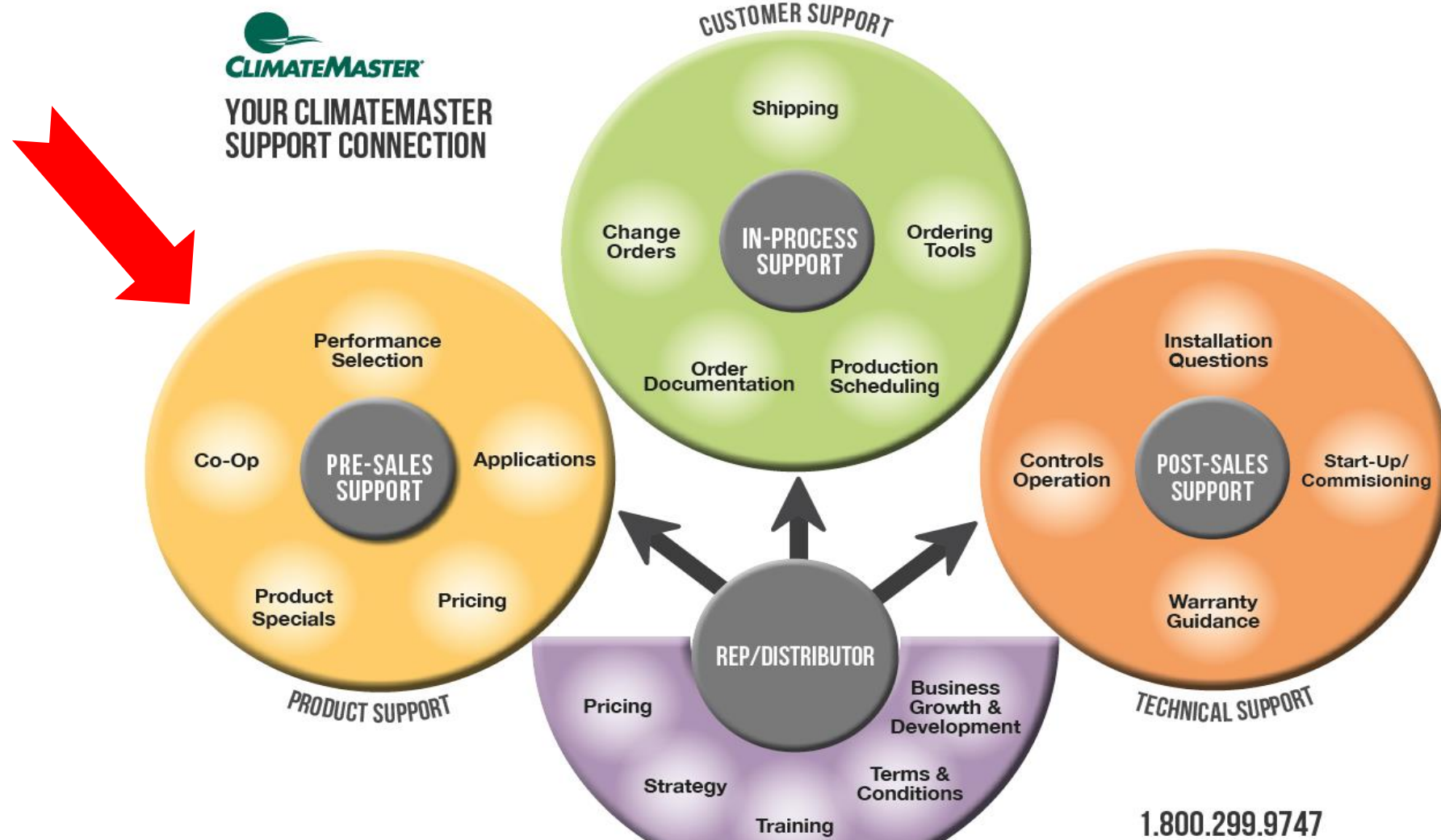
New Phone
system (Jan
21, 2019)

Begin
Hiring
Process
(Sep 18)

E-News
(Jan 18,
2019)

After 2 months of planning- it was time to "Spool-up" the team

Pre-Sales Support



Now that we have invested to provide “enhanced support” ...
Next step is to Channel the “Right question” to the “Right Team” = Recipe for Efficiency



Pre-Sales Support Team (new '19)

Our “on-standby” team- The “Knowledge Bullpen” ready and accessible to support your Pre-Sales Support Needs.

Support you can expect: Performance Selections, Application support, Support of Design Specials, and any current or historical product information. They also create technical documentation and can assist in product competitive positioning and insight.



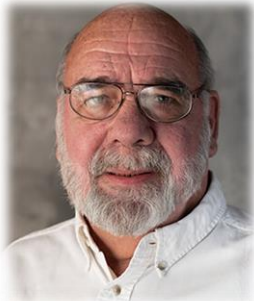
Matt Fender
Marketing Engineer
5 yrs. HVAC
experience with
custom AHU's



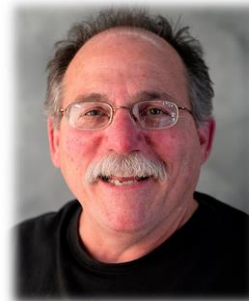
Andrew Pennington
Marketing Engineer
5 years Product Dev.
and controls in various
industries



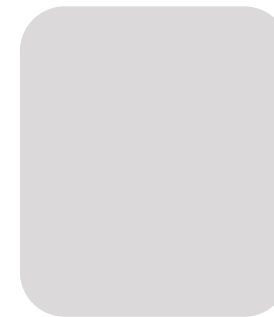
Naima Murray
Product Specialist
12 yrs. Retail Mgmt.
3 years Project
Coordinator in HVAC



Bruce Johnson
Applications Engineer
6 years with CLM
Over 45 years in HVAC
industry, including over
10 as a mechanical
contractor



Scott Stevens
Applications Engineer
Over 20 Years with CLM
Almost 40 years in
HVAC industry



OPEN (2 Roles)
Product Specialist
&
Product Support Mgr.

One call connects you to the team. Simply dial the 800-299-9747
then press 2, then 2 when prompted

Our “Product and Business Systems” Experts.

Main Focus: Manage existing products and systems, Propose product and business system changes, and own the Price, volume and share portion of the products. They define new option prices and system features, and are responsible for creating technical documentation, and can assist in product competitive positioning and insight.



Joe Parsons

Residential Product Manager

Joined CLM '18

30+ years in the Geothermal Marketplace

Active in IGSHPA (committees), GEO, ASHRAE, Served on AHRI BOD, and various other HVAC industry Committees



Nash Mubayiwa
Business Systems Administrator

Joined CLM in '16

10+ years computer systems experience



Joe Ferron

Product Manager

Joined CLM '19

25+ years engr, product mgmt. and sales, including 16 years with Robertshaw



Amy Rainer

Product Manager

Joined CLM in '19

20 years in pumping business, including 6 yrs. product management



Caleb Fox

Product Manager

Joined CLM in '08

Manages Vertical Stack, Console, and Rooftop WSHP lines.

This team supports day-to-day business and is NOT in the 1800 “queue”. They support the Pre-Sales support team, along with all other business processes.

Customer & Technical Support



CLIMATEMASTER®

Marci Ware





CLIMATEMASTER®
YOUR CLIMATEMASTER
SUPPORT CONNECTION

CUSTOMER SUPPORT

Shipping

Improved Customer
Satisfaction

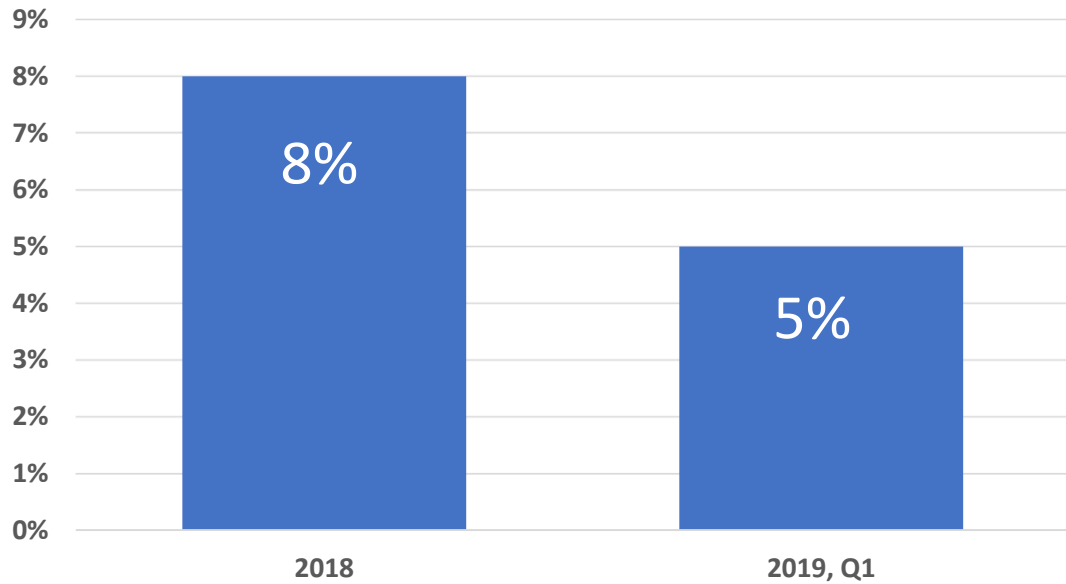
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REGIONAL SALES

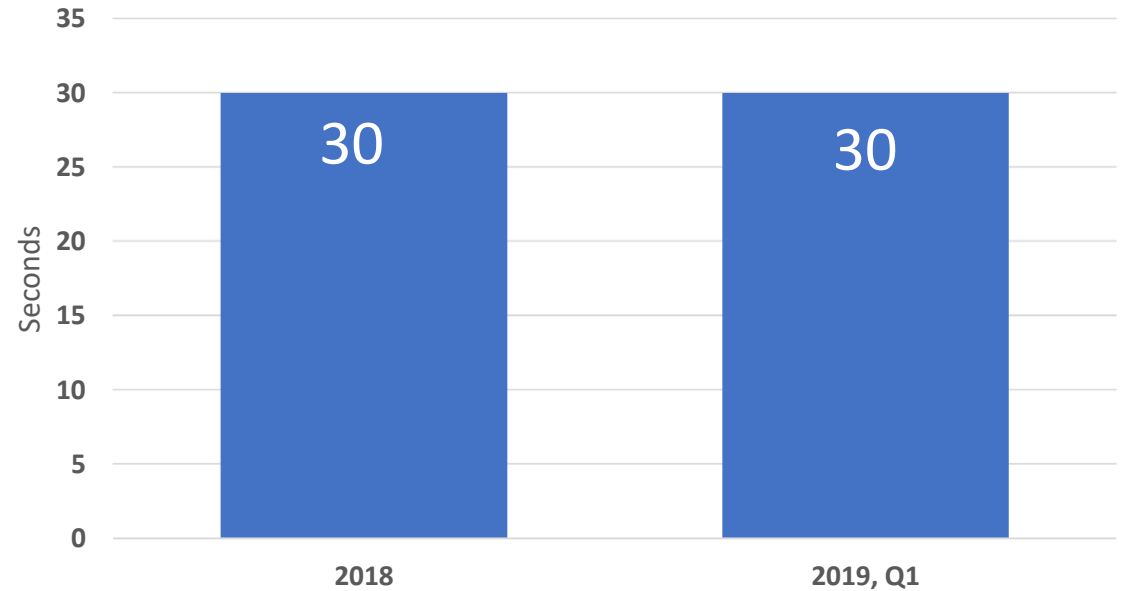
Conditions

1) Reduce Abandoned Calls & Hold Times

Customer Support Abandoned Calls



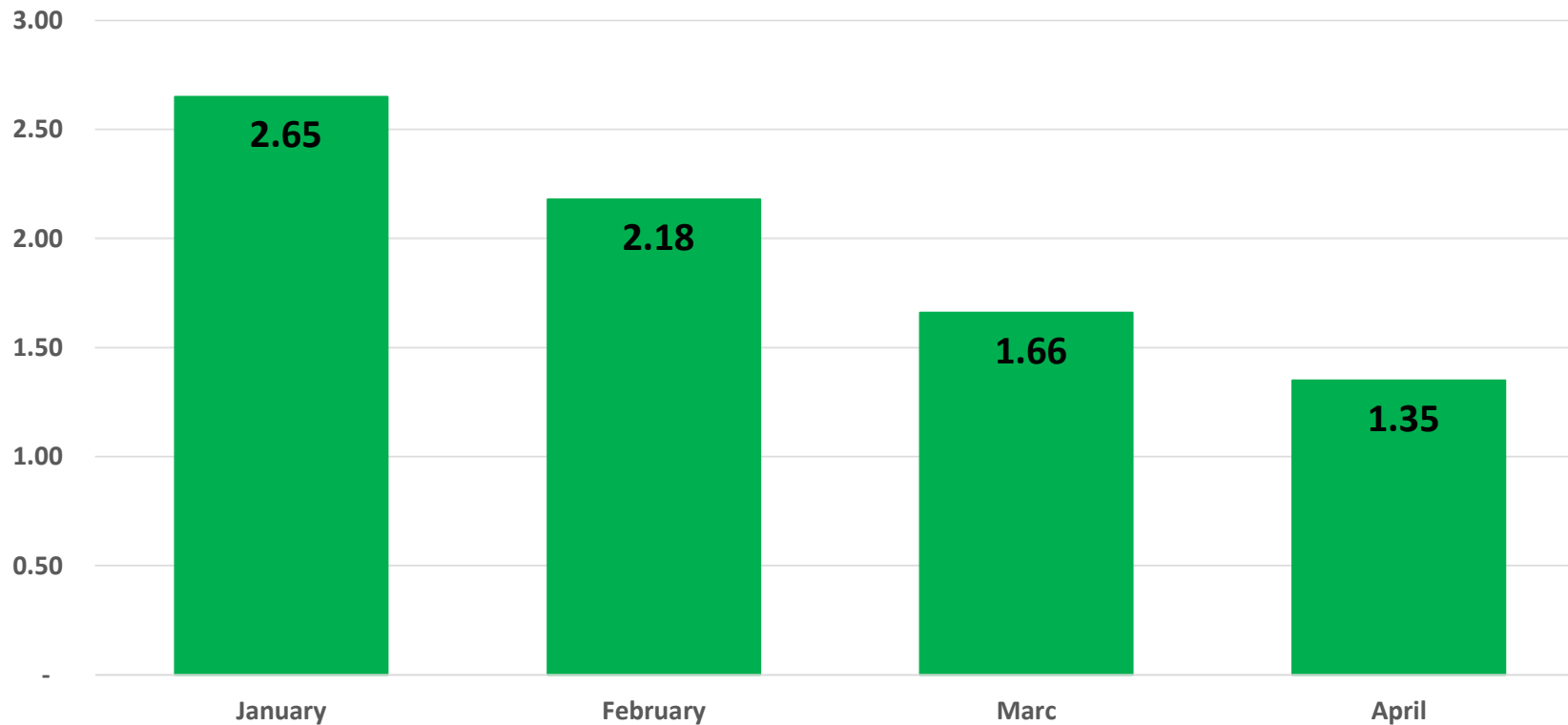
Customer Support Hold Time



Continued Success

1. Improvements in Backlog
2. Dating issues improve as we've made significant progress in manufacturing

Average Number of OA's



Customer Support Team



Yesenia Lopez
Customer Support Rep
1-Year



Pleasant Weisenfluh
Customer Support Rep
3 ½ Years



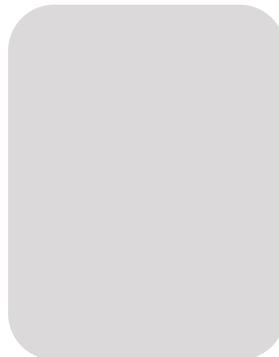
Connie Melton
Customer Support Rep
1-Year



Lisa Hopkins
Customer Support Rep
3 ½ Years



Patrice Drake
Customer Support Rep
6 months



OPEN
Customer Support Rep
Long-term career goals



CLIMATEMASTER®
YOUR CLIMATEMASTER
SUPPORT CONNECTION

CUSTOMER SUPPORT

Shipping

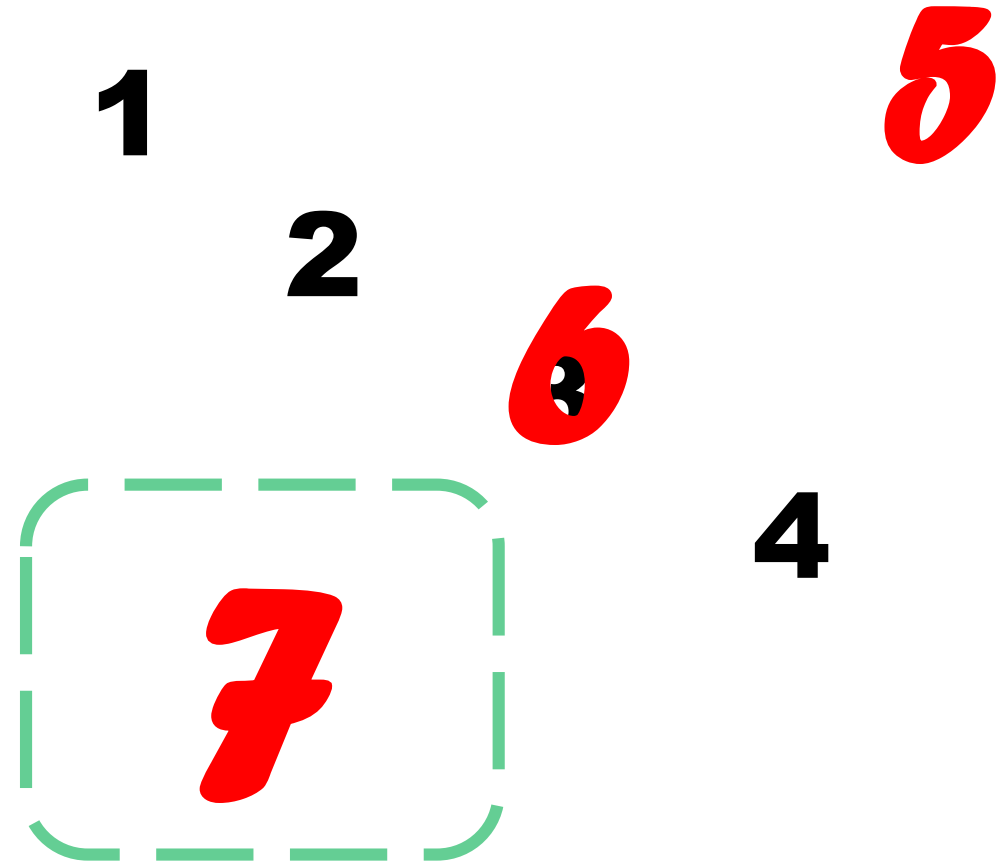
Improved Customer Responsiveness

Terms &
Conditions

1.800.299.9747

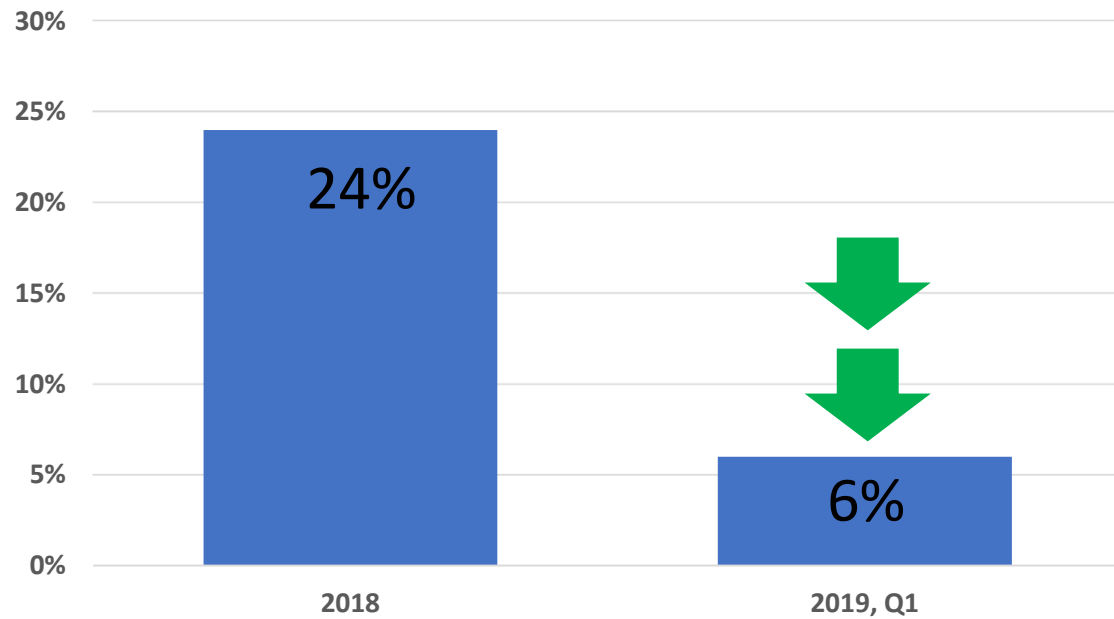
REGIONAL SALES

1) Increase Staff Levels

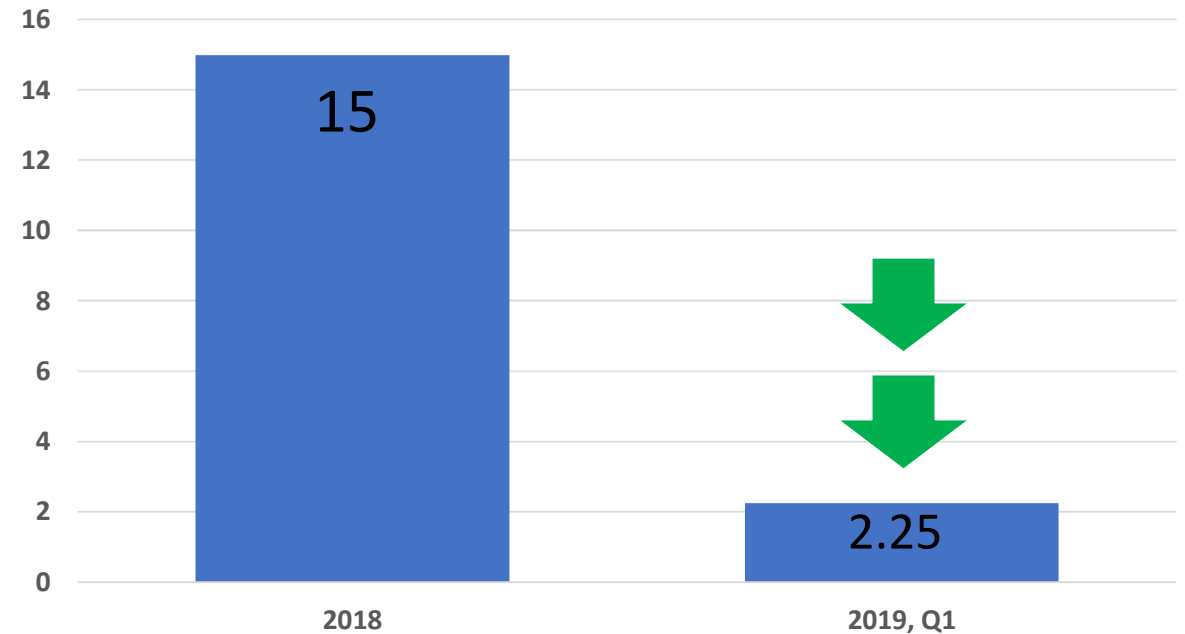


2) Reduce Abandoned Calls & Hold Times

Technical Support Abandoned Calls



Technical Support Hold Time



GREAT PROGRESS!

Technical & Warranty Support Team

**Harry Singh, Technical Support & Warranty Manager**

Started in 7/1/1996. 23 years at CLM. Worked in various departments from assembler to QA auditor to Production Supervisor to Quality Supervisor for Manufacturing Support to his current role as Technical Support Manager. Acquired journeyman license in 2005 and completed OK Mechanical license in 2007.

**Ron Elsenbeck**

Ron has been with CLM for over 33 years. He moved when operations moved from NY to OK. Ron is most experienced member of the Technical Service team.

**Henry Okeugo**

Joined CLM in 1990 as maintenance tech; he took a short break focusing on being an independent construction contractor. He rejoined CLM in 2009 as Tech service representative. Most recently acquired his Oklahoma mechanical license.

**Marcus De La Cruz**

Joined in November, 2018. Marcus holds a Degree in Mechanical engineering. He is happy that he found the perfect job in Oklahoma to utilize his engineering degree and work within a more technical role than he has ever been in.

**Geri Westman**

Has been employed with CLM for over 23 years in multiple capacities, including several years as lab tech. Geri most recently worked as the TS Coordinator before being promoted to Tech Support Rep. She is due to graduate the HVAC program at a local vocational institute.

**Travis Wolf**

Started in January, 2019. Travis had been employed as a journeyman for last 8 years working on various types of HVAC equipment. Travis learned the trade right after high school; also acquiring his journeyman license.

**Alex Roldan**

Started in October, 2018. Alex has a Bachelor's degree in Mechanical Engineering from Oklahoma State University. He also served as a maintenance tech at OSU lab handling different tasks directly related to HVAC industry.

**Ross Wilson**

Joined CLM in 2016. Ross is very energetic and enjoys helping customers. He has several years of experience working with building automation and HVAC system balancing. Ross works closely with engineering and handles our BMS (building management systems) controls support.

Questions?

Training Courses 2019



CLIMATEMASTER®

Sean Hogan & Mike Hammond





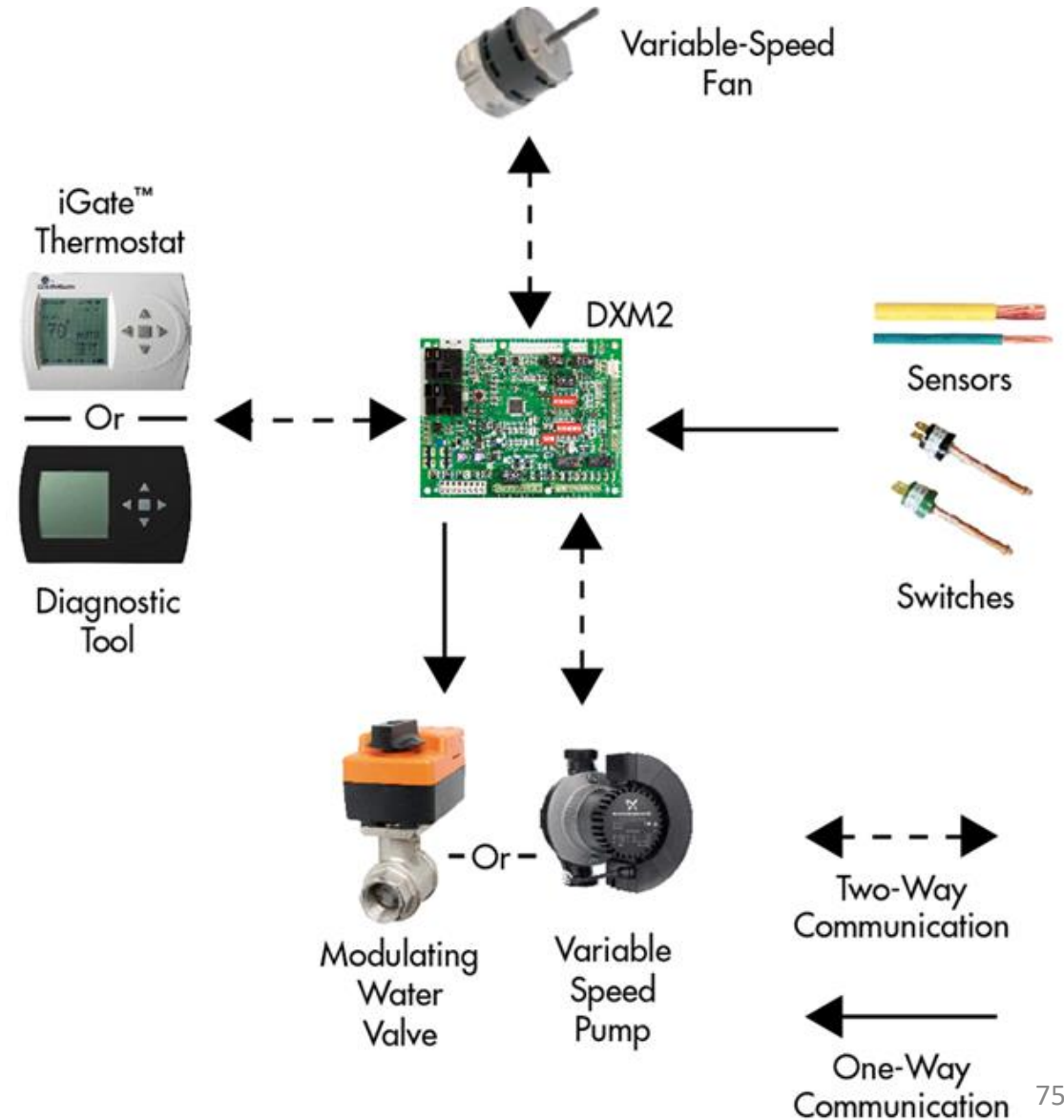
202 Service & Installation:

- Requires 2 full days. Installation and application best practices
 - heat of extraction/heat of rejection
 - refrigeration practices & diagnostics
 - controls including DXM2, troubleshooting
 - loop flushing, antifreeze, pumps and all 4 loop applications and design
- GeoDesigner and Pressure Drop software are referenced
- Recent update includes more diagnostic and troubleshooting



- Pipe fusion can be added onto the 202 but it adds another 1/2 day or can make the 202 class a couple of LONG days
- Socket fusion covered in depth, hands on welding and a written exam for 3 year certification
- Butt fusion is covered along with video support
- Electrofusion is reviewed along with video support
- Requires fusion tools, power, pipe and fittings at training site

- Typically takes 6-7 hours depending on questions.
- We cover vFlow and iGate packaged and split applications, installation, installer set up and fault code retrieval.
- Recent update emphasizes more troubleshooting, use of Digital Troubleshooting Manual, open loop applications. Refrigeration best practices and diagnostics enhanced.
- Use of Digital ATC thermostat, ACD Service Tool and PC service tool





- Core module is a full day service and install and troubleshooting course, essentially it is a 202 class with the loop portion removed
- Fusion is not a part of this course



- Takes a full day and is probably our strongest class
- We cover loop design both open and closed, pump selection and sizing using hand calcs and software. Loop flushing, antifreeze & how to verify, Importance of load calcs, soil conditions as well as some loop troubleshooting.
- Examples of common mistakes-cause and effect
- We also go over examples of retrofitting older R-22 units with today's 2 speed 410A and what it does to the loop temps
- GeoDesigner and Pressure drop software are referenced throughout

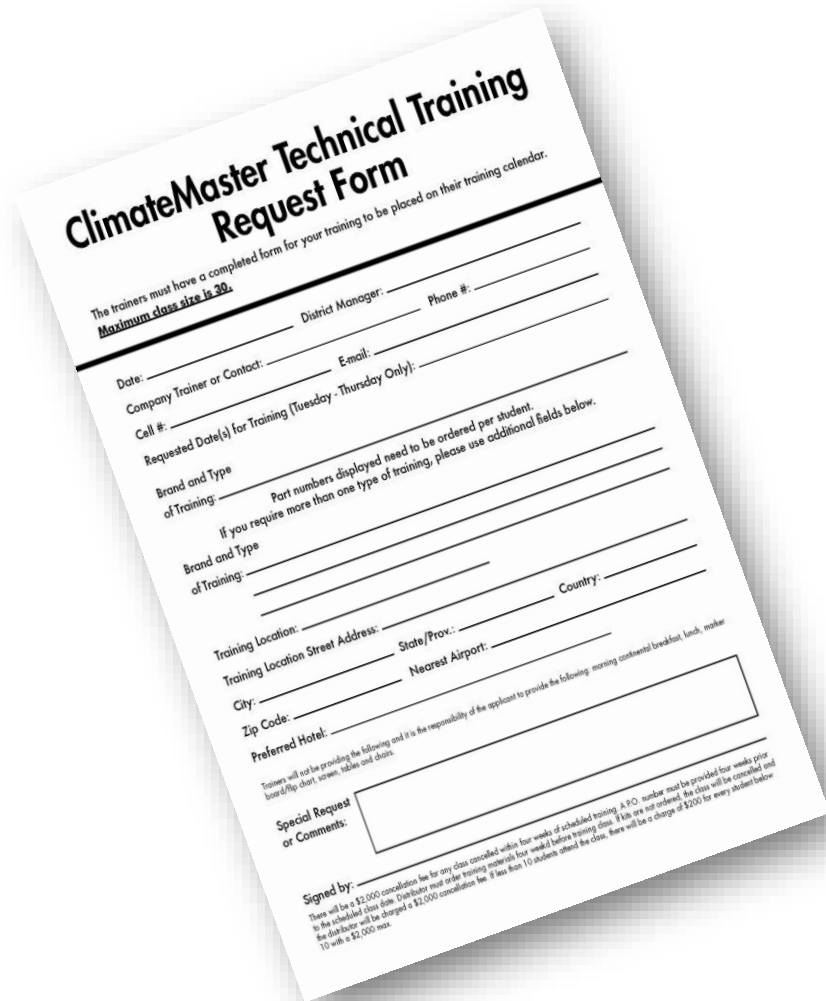


- Takes approx. 5 hours depending on questions
- We cover sizing, applications, buffer tank, swimming pools, radiant and snow melt
- Review of common mistakes, cause and effect usually centered around application
- Secure Start installation and recommendation
- We touch on controls but not a great deal since we don't sell hydronic controls



- Minimum of 10 Geo Elite dealers required, maximum of 15.
- Held in OKC quarterly or as demand warrants, can be held in qualified field locations.
- The training is 2 days, 1 day in classroom and 2nd day is hands on the functioning Trilogy unit and Climazone.
 - The distributor must have 20 amps., 230 volt
 - Access to water for flushing and a quiet enough location with reasonable room temps to conduct the class and operate a unit
 - We reference but do not cover software in this class, we leave that to the DM

Training Request Form



The trainers must have a completed form for your training to be placed on their training calendar.
Maximum class size is 30.

Date: _____ District Manager: _____ Phone #: _____
Company Trainer or Contact: _____ E-mail: _____
Cell #: _____
Requested Date(s) for Training (Tuesday - Thursday Only): _____
Brand and Type of Training: _____ Part numbers displayed need to be ordered per student.
If you require more than one type of training, please use additional fields below.
Brand and Type of Training: _____
Training Location: _____ Country: _____
Training Location Street Address: _____ State/Prov.: _____
City: _____ Nearest Airport: _____
Zip Code: _____
Preferred Hotel: _____
Special Request or Comments: _____
Signed by: _____

Trainers will not be providing the following and it is the responsibility of the applicant to provide the following: morning continental breakfast, lunch, make board/lip, shut screen, video and class.
There will be a \$2,000 cancellation fee for any class cancelled within four weeks of scheduled training. A P.O. number must be provided four weeks prior to the scheduled class date. Trainers must order training materials four weeks before training date. If the fee is not ordered, the class will be cancelled and the distributor will be charged a \$2,000 cancellation fee. If less than 10 students attend the class, there will be a charge of \$200 for every student below 10 with a \$2,000 max.

- Required to be completed and returned to DM and both trainers before calendar commitment
- Form is a drop-down menu for each class selection
- Each course includes part numbers tagged on end to order **per student** on the business center minimum 14 days before delivery date

Training Requirements



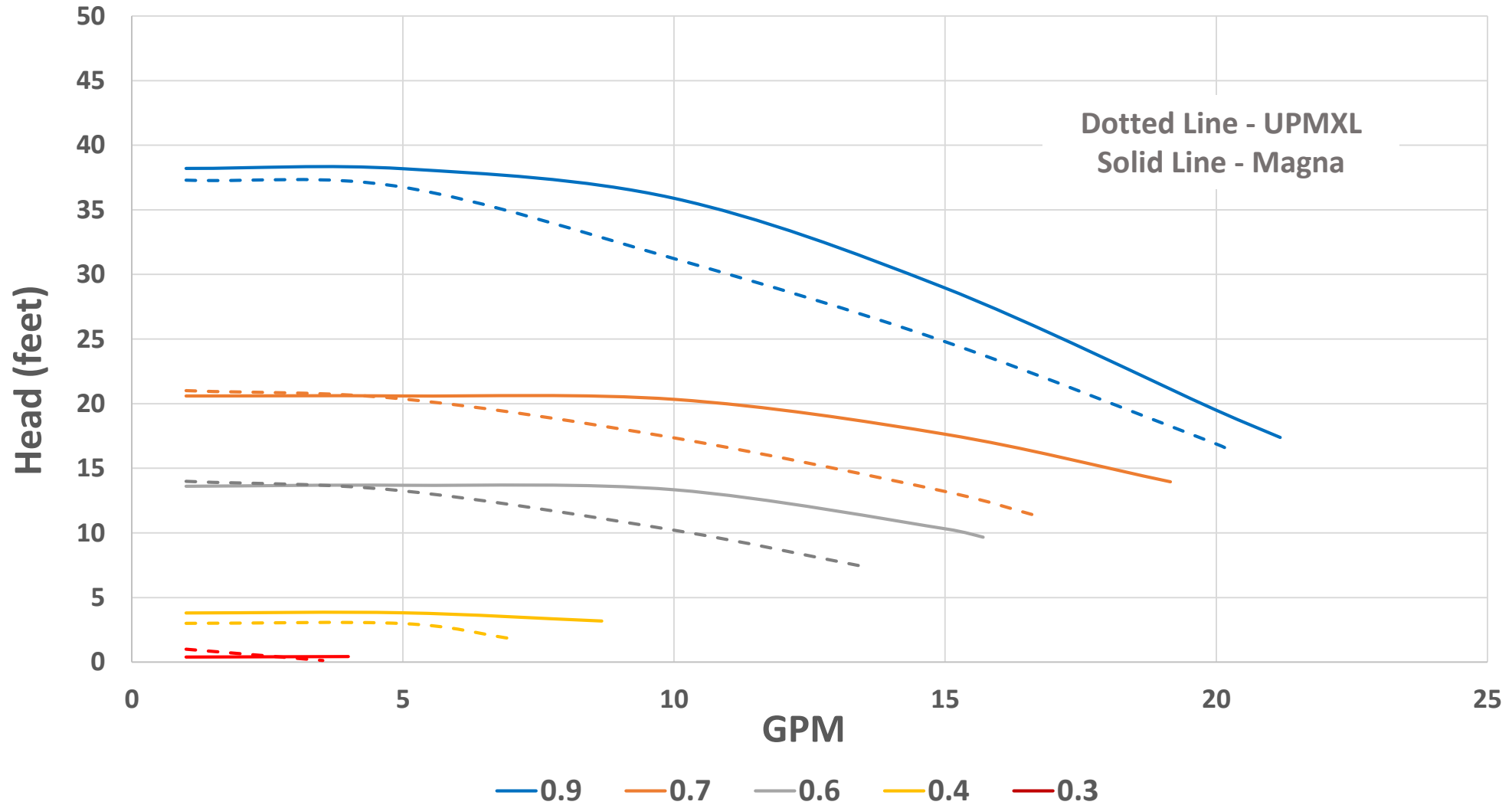
- All classes start promptly at 8 AM daily
- Class size: minimum of 10 and maximum of 30 (other than Trilogy)
- Suitable location with projection screen, white board or flip chart, and classroom seating and tables
- Continental breakfast
- Lunch (please no pizza, we get pizza way too often)

Magna being replaced with UPMXL-GEO



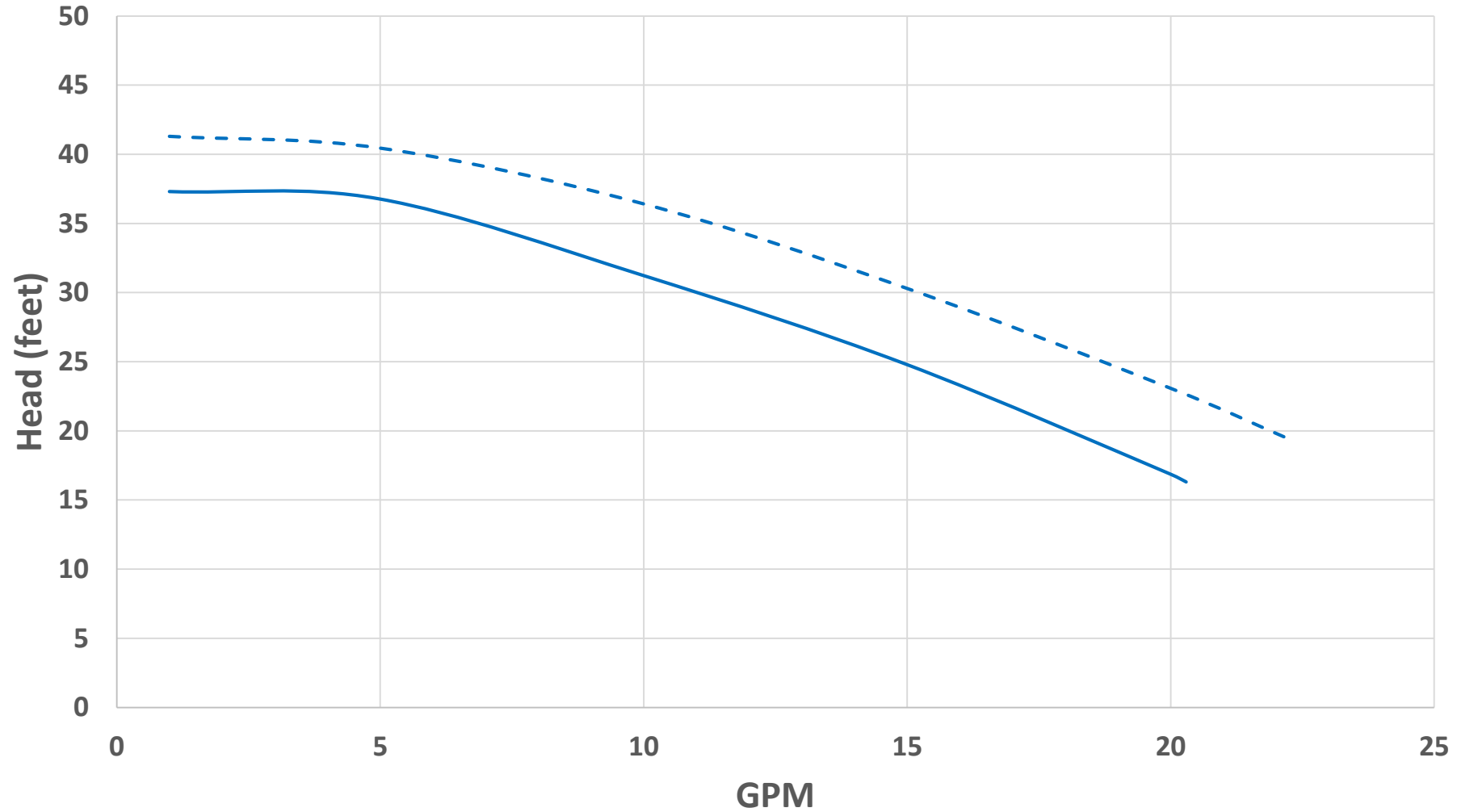
Must Burp Air from Pump Shaft

Magna and UPMXL with check valve at different % Flow



Pump performance differences not as significant as once thought

UPMXL pump with and without check valve



Check Valve ships installed in the pump & really ONLY needed if a shared loop with other pumps

Training...

Is Never Finished



Photo courtesy of Corken Steel Products Company

Consumer Website



Scott Stayton

Marketing Director – Climate Control Group



Comfortable

Learn what true comfort means for your family



Affordable

Efficiency you can count on for years to come

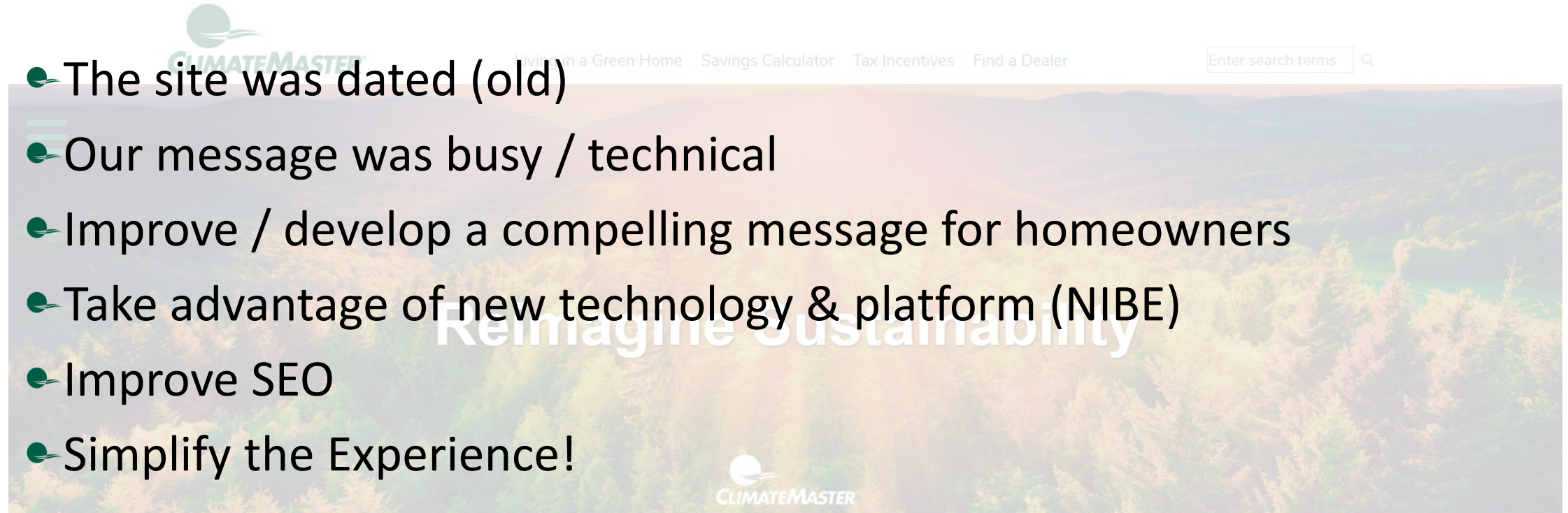


Sustainable

Harness the energy of the earth, while protecting your family

Why Update the Site?

- The site was dated (old)
- Our message was busy / technical
- Improve / develop a compelling message for homeowners
- Take advantage of new technology & platform (NIBE)
- Improve SEO
- Simplify the Experience!



Comfortable

Learn what true comfort means for your family



Affordable

Efficiency you can count on for years to come

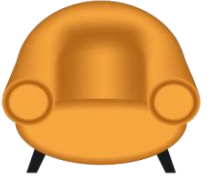


Sustainable

Harness the energy of the earth, while protecting your family

Comfortable

- True comfort is... something you never think about
- Consistent temperature
- Humidity control
- Outdoor environment



Comfortable



Experience True Comfort

Affordable

- An easy financial decision
- More focus on savings...less focus on cost
- Financing link and options



Affordable

A photograph of a family consisting of a woman, a man, and a young boy. They are all smiling and looking towards the right side of the frame. The woman is leaning over the man's shoulder, and the boy is leaning over the man's other shoulder.

Significant Savings Are a Reality

- Reliable. Renewable. Sustainable.
- Environmental stewardship
- Fossil fuel elimination and safety



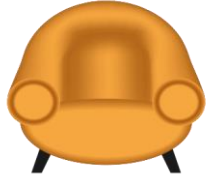
Sustainable

An aerial photograph of a dense forest during autumn. The trees are in various stages of color change, with vibrant yellows, oranges, and reds interspersed with deep greens. The sun is shining from the upper left, creating a warm, golden glow and lens flare effects across the scene.

The Most Reliable Renewable on Earth

Key Improvements

- Comfortable, Affordable and Sustainable messaging
- Updated Geothermal Savings Calculator
- Consumers can now opt-in to receive emails from Savings Calculator
- Implemented the first automated follow up email
 - Soon to implement 3 more emails
- All web pages on new site have been enhanced with keywords and page descriptions
- Reference to consumer financing now on website
- Site is enhanced for mobile – more options to be added to hamburger menu



Comfortable

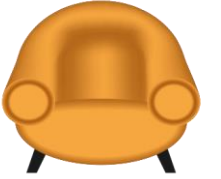


Affordable



Sustainable

- Ramp up link exchange programs
- Start Google Ads campaigns
- Searching for testimonials to add to the site
- Searching for contractor profilers/testimonials to add to the site
- Implement The 24/7 Renewable Message on site



Comfortable



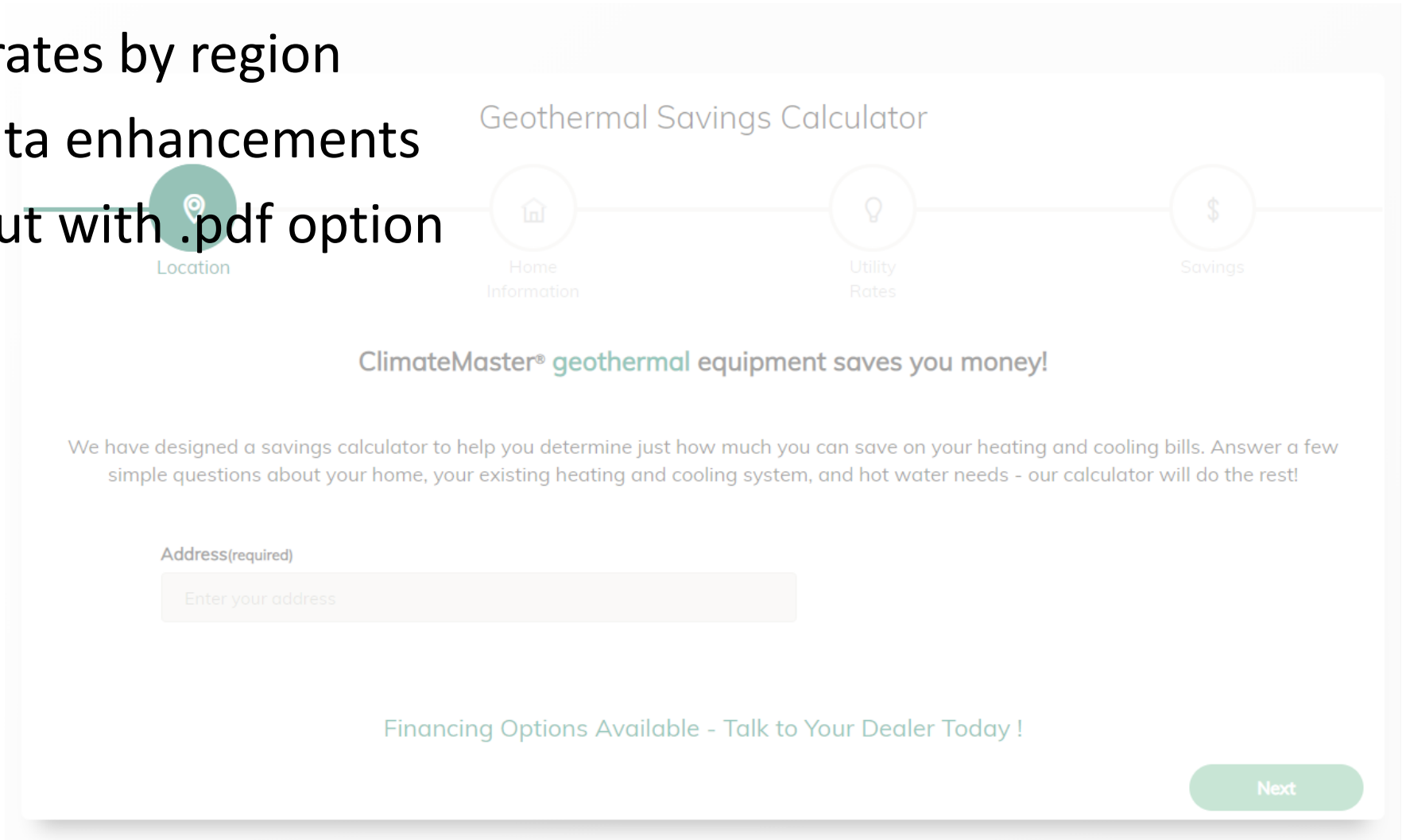
Affordable



Sustainable

The 24/7 Renewable

- Updated, simplified interface and navigation
- Updated utility rates by region
- Using Zillow® data enhancements
- Clean data output with .pdf option



Geothermal Savings Calculator

Location Home Information Utility Rates Savings

ClimateMaster® geothermal equipment saves you money!

We have designed a savings calculator to help you determine just how much you can save on your heating and cooling bills. Answer a few simple questions about your home, your existing heating and cooling system, and hot water needs - our calculator will do the rest!

Address(required)
Enter your address

Financing Options Available - Talk to Your Dealer Today !

Next



Comfortable

Learn what true comfort means for your family



Affordable

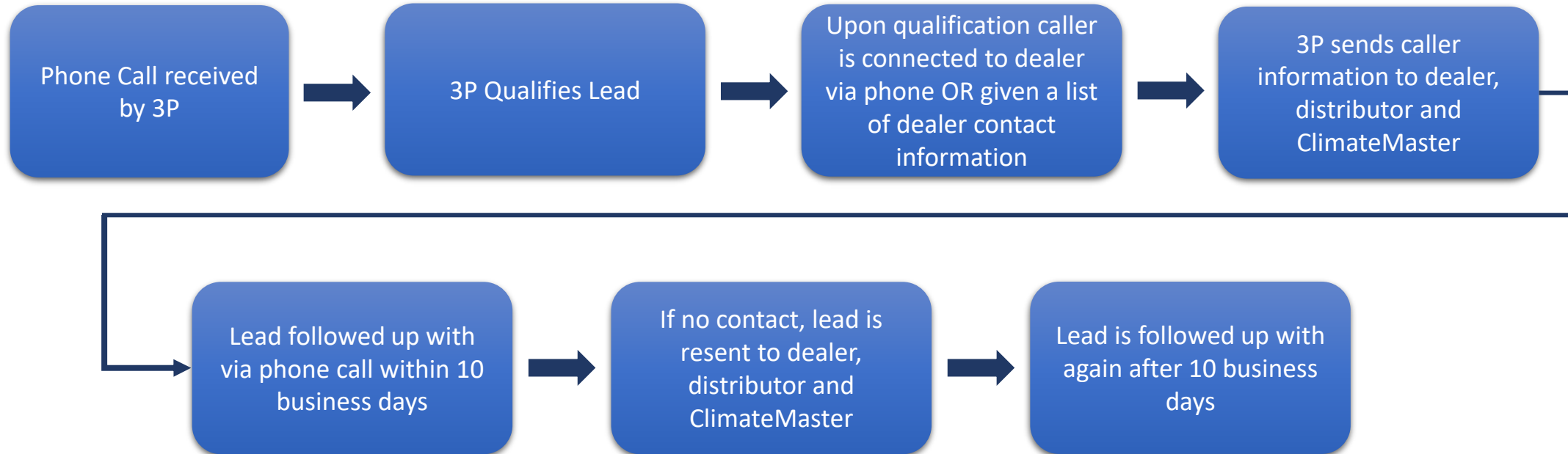
Efficiency you can count on for years to come



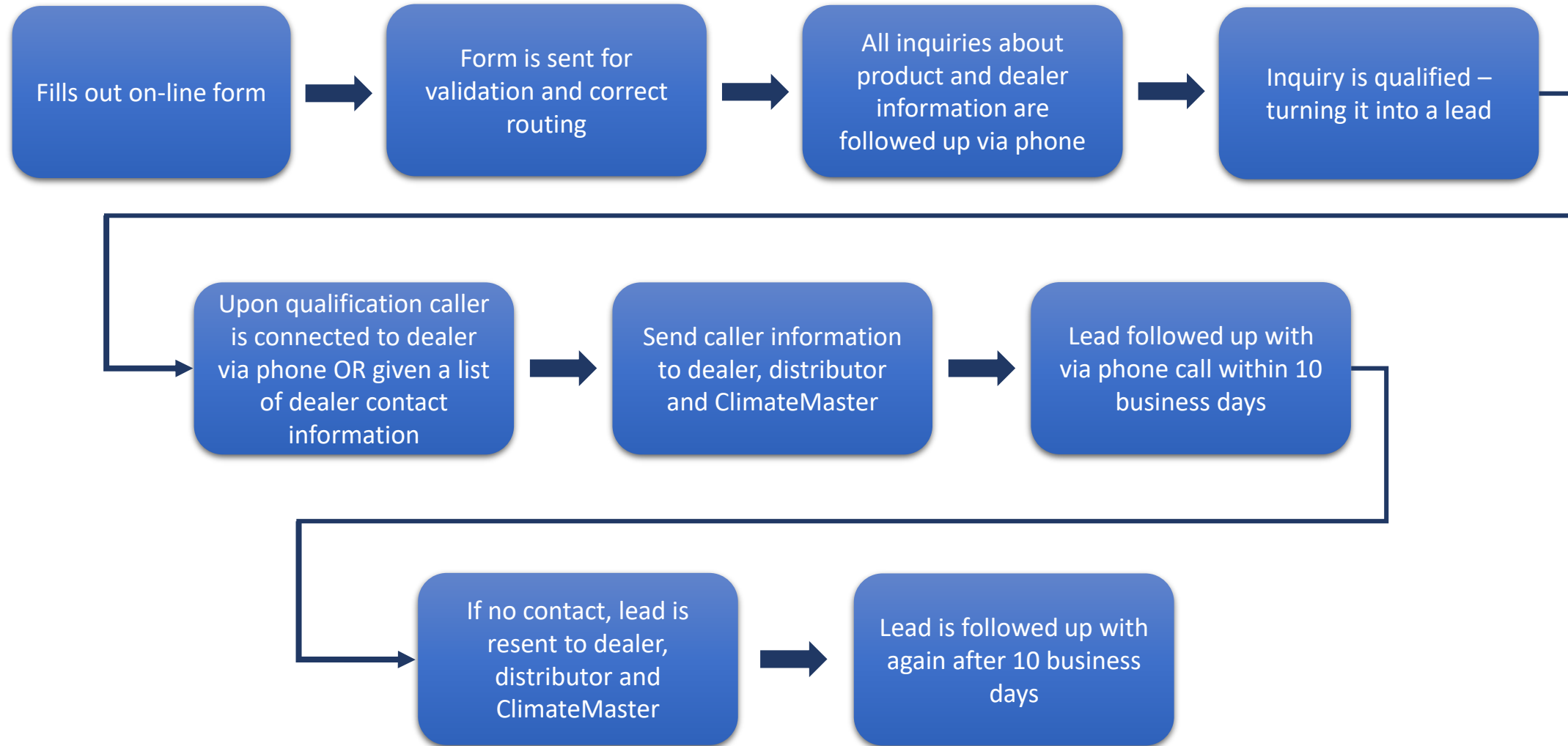
Sustainable

Harness the energy of the earth, while protecting your family

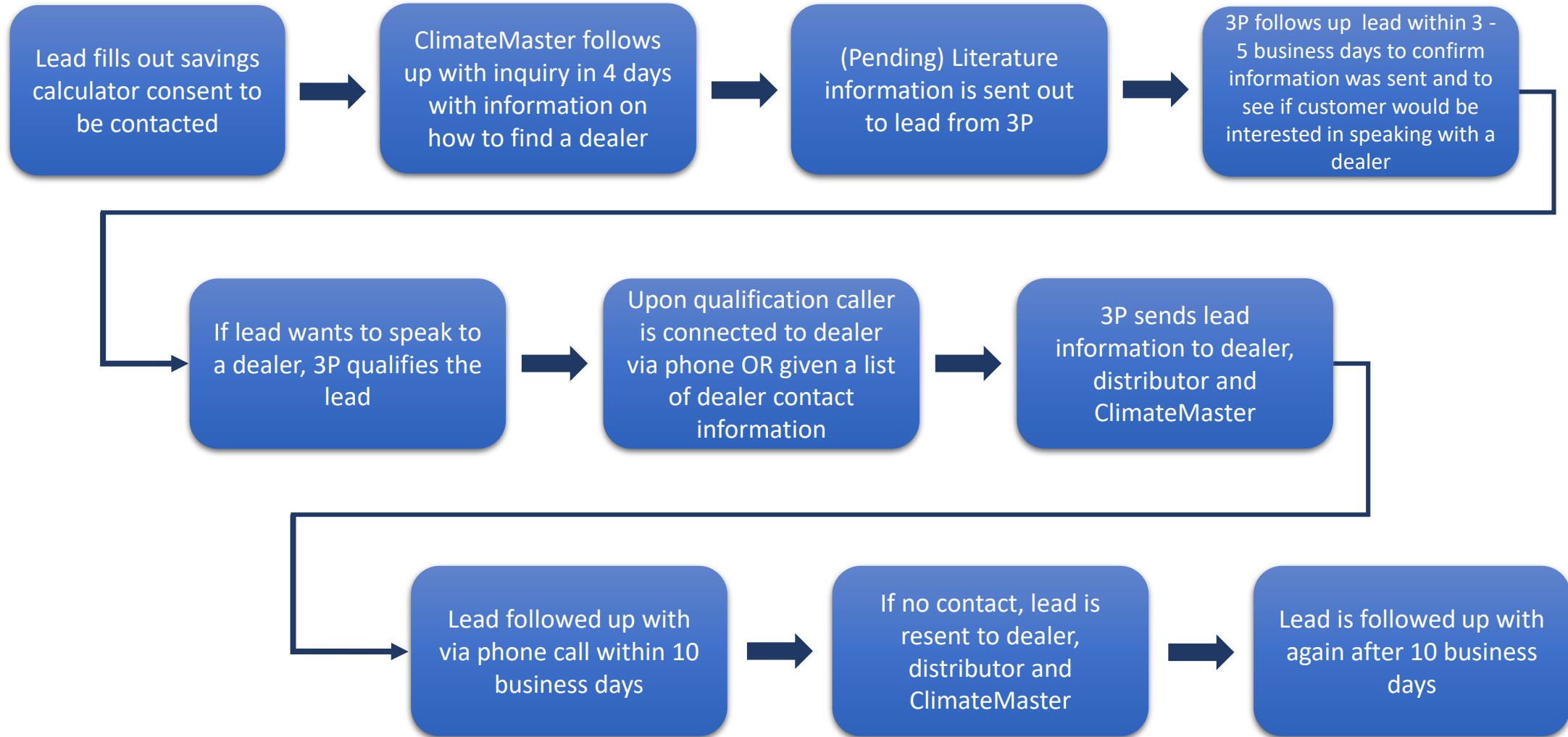
- Updated UX Design
- Update newspaper/magazine ads available for use on the site
- Update pop-up booths and images for use at Homeowner events and office space
- Update of www.ClimateMasterpromoitems.com with new offerings and update of interface



Lead Generation – Contact Form



Lead Generation – GEO Calculator



- Immediate follow up
- Drip Marketing
 - Subsequent e-mails



Nicole,

Thank you for taking the time to visit our [ClimateMaster[®] website](#). We hope that you have a better understanding of what geothermal systems can do for you!

We also hope you found our [savings calculator](#) helpful. Now that you have seen the results, it's time to find out which one of our systems is right for you. To find a local area dealer use our [Dealer Locator](#). Be sure to ask your dealer about additional savings opportunities in your state or locale.

ClimateMaster is very passionate about geothermal and we hope you are too. If you have any additional questions or would like to receive more information call (877) 436-6263.



Comfortable



Affordable



Sustainable

Q & A – Day 1



Agenda (April 30th)

- 2019 COOP Program – Joe Parsons, Mike Murphy
- Finance Program – EGIA – Joe Parsons
- Break
- NEW PRODUCTS – Joe Parsons & Joe Ferron
- Business Dev – Utility/Builders – Titian Burris
- Sustainability Award Presentation – Todd Van Hyfte
- Q & A

2019 Distributor Program



CLIMATEMASTER®

Joe Parsons



- 2019 Programs
- GeoElite Dealer
- Personal Use Program
- Co-Op Advertising
- Ideas for 2020
- Performance Based Program
- Questions

GeoElite Dealer Program Benefits

The ClimateMaster GeoElite Dealer Program is designed to showcase the capabilities of a select group of geothermal installers. GeoElite Dealer program members can expect:

- Top Listing in ClimateMaster Dealer Locator
- Priority Lead Referral – receive more leads in your area
- Consumer 100% Satisfaction Guarantee
- 5% Co-Op rate on qualifying residential purchases
- Distributors are responsible for training and assuring GeoElite dealers meet and maintain all program requirements



Helps Build Brand Awareness

- Available to all residential ClimateMaster Dealers
- Local utility
- Builders
- Drillers



Disco

\$300 per ton

Discount on ClimateMaster Water-to-Water, Packaged or Split unit purchases for industry partners for their personal home

That's right! Industry partners, purchasing Water-to-Water, Packaged or Split systems, receive a \$300 per ton discount. This program is available to our industry partners at distributorships, residential builders and utility professionals to receive a discount on installing ClimateMaster equipment for their personal or business.

Below are the program details, a registration form to be completed. Please follow the submission procedures as listed in the Personal Use Program (PUP) form.



- **2019 Co-Op Budget 1/1/19 – 12/31/19**
- **Account Balance Established from 2018 Sales**
- **3% Co-Op Rate on Residential Equipment Purchases**
- **2% Bonus Rate for GeoElite Dealer Purchases**

Performance Based Program Strategy

Challenge

- Create a program that rewards investment in growth initiative

The Process

- Start Early
- Engage Stakeholders

The Plan

- Encourages Communication
- Sets Quarterly Goals
- Provides Feedback / What's Working
- Announce in Q4
- Launch January 1, 2020

Desired Results

- Win, Win, Win!



Planned Launch January 1, 2020

January 2020

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Brainstorming / Plan Development



Planned Effectivity Date January 1, 2020	Performance Based Program <ul style="list-style-type: none">• Compared to same period in prior year	Baseline = prior years qualifying residential sales qualify distributor for 3% co-op rate
Maintain baseline to achieve 3% calculated QoQ prior year to current year	Leverage additional earned co-op \$ to achieve growth target	-5% below base = 2% co-op rate
10% above base = 4% co-op rate	15% above base = 5% co-op rate	20% above base = 6% co-op rate

Sales goals are assigned by the regional manager to each Distributor

Example Chart:

Prior Year Same Qtr	Current Yr Quarter Result	On-Plan 3%	10% Growth 4%	15% Growth 5%	20% Growth 6%
\$100,000	\$99,000	\$2,940			
\$130,000	\$143,000		\$5,720		
\$150,000	\$172,500			\$8,625	
\$120,000	\$150,000				\$9,000



Sliding Scale based upon comparison of Prior Year, Same Quarter

Ideas for Usage and Funds Disbursement

Usage of Funds:

At the discretion of the Distributor, funds are to be used to promote the ClimateMaster residential brand and only to be used to promote the ClimateMaster brand.

Examples of usage: Creative ways to promote the brand, E.g.: Dealer sponsored trips, advertising via social media, google search optimization, web, dealer company websites etc.

Thank You!

Questions?

Volunteers?

EGIA ClimateMaster Financing Program Overview

Rob Noll – EGIA General Manager





- EGIA has \$6.7 Billion In residential Funding
- EGIA supports utilities, manufacturers, & distribution across the energy efficiency and renewables space
- EGIA works with most major financing providers
- Testing and vetting new programs to keep most competitive offers in front of dealers

Why Offer Financing?

Address Different Types of Customers

1

Cash Buyers

These people have the cash but are hesitant to write the big check

2

Payment Buyers

These folks need the lowest monthly payment to pull the trigger

3

Bad Credit

Since 2008, up to 40% of applications can't be approved by "A" paper lenders.

Don't walk away from those sales.

If you address each of these needs you statistically have a better chance of closing the sale

**What percentage of homeowners in the US
live paycheck to paycheck?***

(That's 3 out of 4 people)

75%

**CNN Money Findings*

SURVEY: HOW MUCH MONEY DO YOU HAVE SAVED IN YOUR SAVINGS ACCOUNT?



No One Has Any Money

The Times They Are a Changin'...



- **In 1989**, the average home cost \$125,200 and the median income was \$51,681. (17% of annual spending)
- **In 2017**, the average home cost \$236,600 and the median income is \$56,516. (30% of annual spending)

- **In 1989**, the average new car cost \$14,372. (7% of annual spending)
- **In 2017**, the average new car costs \$35,421. (15% of annual spending)



- Today, the average ticket price for an HVAC replacement is \$6,700. (12% of annual income, as a lump sum)
- A high efficiency system often exceeds \$10,000. (18% of annual income, as a lump sum)

One Lender, a High Contractor Fee, No Low Payment Option, No No Payment Option



ACCREDITED BUSINESS
BBB RATING

Home Who We Are Service Repairs & Maintenance

0% Financing/60 Months on a

0% APR for 60 Months

"If replacing your system is in your near future, I encourage you to check you, you're going to get the best bang for your buck in August." - Chris

Perhaps you don't know that you need a new system. might help you decide:

0% APR PLUS **REBATES up to \$600⁰⁰**
Combined Utility Rebates

See your independent dealer for complete program eligibility, dates, details and restrictions. Valid on qualifying systems only.

Get started

Air Services Inc.
AIR SERVICES INC.
AIR CONDITIONING
ELECTRICAL & PLUMBING

SPECIAL FINANCING

0% APR for 72 MONTHS!*

Adding value to your home and comfort to

\$25,000 job

60 mos plan: $\$29,761 / 60 = \496
vs 20 yr 6.99% installment plan: $\$27,472 \times .00775 = \213

Value of Installment Loans

LOWER
monthly
payments



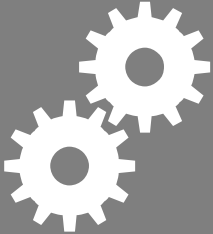
ADVERTISE what
matters to
homeowners



ABILITY TO
finance **WIDER**
risk profile



LESS PAINFUL
if **YOUR** customers
miss a payment

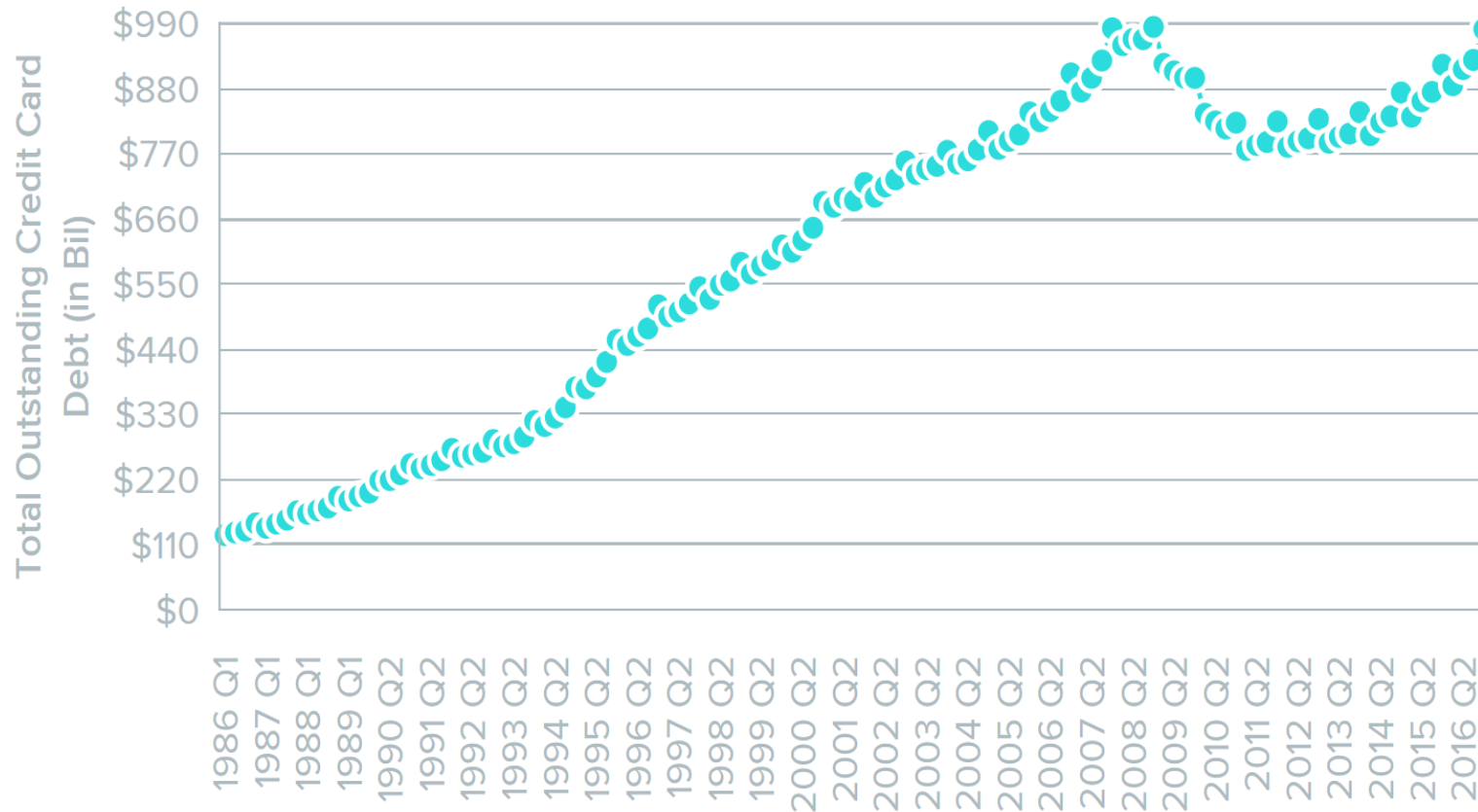


PLAN TERMS DEALERS PREFER

- Lowest Monthly Payments
- No Interest/No Payment

Financing Best Practices

Total Outstanding Credit Card Debt Q1 1986 – Q1 2017



- **17%** is the average credit card APR
- **49%** use credit cards almost all of the time
- **\$16,425** is the average household credit card debt*

*Nerdwallet.com 2017



Warren Buffet : Warren Edward Buffett is an American business magnate, investor, and philanthropist who serves as the chairman and CEO of Berkshire Hathaway.



Sam Walton: Samuel Moore Walton was an American businessman and entrepreneur best known for founding the retailers Walmart and Sam's Club.



Every contractor has the story where someone paid cash for a system who they didn't expect would be capable based on their general appearance.



Every contractor has the story where someone who looked like a cash customer but couldn't afford the retrofit.

- Your customer has different circumstances than you
- Always offer 2 options:
 - **A low monthly payment**
(The closer to \$100 per month the better chance of closing your payment customer)
 - **12 month or longer no interest / same as cash**
(For your cash customer who is having a hard time parting with their cash)

Waiting for a customer to ask for financing puts them in an awkward position. Don't make them admit that they can't afford it. Instead, let them take advantage of a good offer.

Upsell Using Payments – New Install

Good 14 SEER Basic System	Better 16 SEER A Few Upgrades	Best GEO THERMAL Install
Total: \$6,700	Total: \$10,500	Total: \$30,000
Monthly: \$142.04 @ 9.99% For 60 Months Or 6 months No Payments	Monthly: \$168.00 @ 8.99% For 84 Months Or 12 Months No Payments	Monthly: \$197.70 @ 4.99% For 240 Months Or 24 Months No Payments

Use Financing promotions to incent the customer towards geothermal.

How much would the customer save on utility bills versus conventional HVAC?



Upsell Using Payments – Geothermal Only

Good ClimateMaster Basic	Better ClimateMaster A few upgrades	Best ClimateMaster All the bells & whistles
Total: \$26,827 (\$25K project + dealer fees using 30/70 combo loan)	Total: \$33,765 (\$30K project + dealer fees using 30/70 combo loan)	Total: \$40,071 (\$35K project + dealer fees using 30/70 combo loan)
Monthly: 217.82 @ 6.99% For 120 Months combo'd with 12 months SAC \$18,778 on fixed payment \$8,041 on 12 months SAC	Monthly: \$218.48 @ 4.99% For 144 Months combo'd with 12 months SAC \$23,635 on fixed payment \$10,129 on 12 months SAC	Monthly: \$184.96 @ 4.99% For 240 Months combo'd with 12 months SAC \$28,050 on fixed payment \$12,021 on 12 months SAC

Which \$30K Geothermal project's loan is better? Consider Dealer Fee, Monthly Payment, Interest Rate & True Cost of Ownership.

Option 1

Term = **12 years**

Interest Rate = **2.99%**

Dealer Fee = **16.726%**

Structure = **30% SAC / 70% Fixed**

Total Amount Borrowed = **\$36,026**

Loan Program	Option 1 70/30 Combo Loan 2.99% 12 Year, 12 mos SAC	Option 2 70/30 Combo Loan 4.99% 20 Year, 12 mos SAC	Option 3 70/30 Combo Loan 6.99% 20 Year, 12 mos SAC
Dealer Fees	16.726%	13.856%	9.761%
Term (Months)	144	240	240
Interest Rate	2.99%	4.99%	6.99%
Project	\$ 30,000	\$ 30,000	\$ 30,000
Dealer Fees	\$ 6,026	\$ 4,825	\$ 3,245
Customer Price	\$ 36,026	\$ 34,825	\$ 33,245
Fixed Loan %	70.0%	70.0%	70.0%
Fixed Loan Principal	\$ 25,218	\$ 24,378	\$ 23,272
Same as Cash Principal	\$ 10,807.70	\$ 10,447.62	\$ 9,973.51
Effective Monthly PMT	\$ (208.63)	\$ (160.75)	\$ (180.28)
Customer Total Cost to Own*	\$ 30,043	\$ 38,580	\$ 43,268

*Assumes customer is able to fully utilize 30% ITC

Which \$30K Geothermal project's loan is better? Consider Dealer Fee, Monthly Payment, Interest Rate & True Cost of Ownership.

Option 2
 Term = **20 years**
 Interest Rate = **4.99%**
 Dealer Fee = **13.856%**
 Structure = **30% SAC / 70% Fixed**
 Total Amount Borrowed = **\$34,825**

Loan Program	Option 1 70/30 Combo Loan 2.99% 12 Year, 12 mos SAC	Option 2 70/30 Combo Loan 4.99% 20 Year, 12 mos SAC	Option 3 70/30 Combo Loan 6.99% 20 Year, 12 mos SAC
Dealer Fees	16.726%	13.856%	9.761%
Term (Months)	144	240	240
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Customer Total Cost to Own*	\$ 30,043	\$ 38,580	\$ 43,268

*Assumes customer is able to fully utilize 30% ITC

Option 3
 Term = **20 years**
 Interest Rate = **6.99%**
 Dealer Fee = **9.761%**
 Structure = **30% SAC / 70% Fixed**
 Total Amount Borrowed = **\$33,245**

Which \$30K Geothermal project's loan is better? Consider Dealer Fee, Monthly Payment, Interest Rate & True Cost of Ownership.

Option 1
 Term = **12 years @ 2.99**
 Total Amount Borrowed = **\$36,026**

Option 2
 Term = **20 years @ 4.99**
 Total Amount Borrowed = **\$34,825**

Option 3
 Term = **20 years @ 6.99**
 Total Amount Borrowed = **\$33,245**

Loan Program	Option 1 70/30 Combo Loan 2.99% 12 Year, 12 mos SAC	Option 2 70/30 Combo Loan 4.99% 20 Year, 12 mos SAC	Option 3 70/30 Combo Loan 6.99% 20 Year, 12 mos SAC
Dealer Fees	16.726%	13.856%	9.761%
Term (Months)	144	240	240
Interest Rate	2.99%	4.99%	6.99%
Project	\$ 30,000	\$ 30,000	\$ 30,000
Dealer Fees	\$ 6,026	\$ 4,825	\$ 3,245
Customer Price	\$ 36,026	\$ 34,825	\$ 33,245
Fixed Loan %	70.0%	70.0%	70.0%
Fixed Loan Principal	\$ 25,218	\$ 24,378	\$ 23,272
Same as Cash Principal	\$ 10,807.70	\$ 10,447.62	\$ 9,973.51
Effective Monthly PMT	\$ (208.63)	\$ (160.75)	\$ (180.28)
Customer Total Cost to Own*	\$ 30,043	\$ 38,580	\$ 43,268

*Assumes customer is able to fully utilize 30% ITC

How is it that a project costing \$2,781 more because of the higher dealer fee ends up costing a customer \$13,225 less in the long run?

Finance Program Offerings

Primary Programs with the Best Options for Geothermal

EnerBankUSA®



SERVICE FINANCE COMPANY, LLC

Additional Programs Available

 MOSAIC

GreenSky™

A logo icon consisting of a 3x3 grid of squares. The top-right square is dark green and contains a white dollar sign. The other squares are light green.

FOUNDATION
FINANCE COMPANY

5, 7, 10, 12 & 20 year loan terms from 1.99%-12.99%

Loan Amounts from \$1,000 - \$65,000

3-24 month NO payment/NO interest “Same-As-Cash” loans

30 / 70 Combo Loans to allow NO payment on 30% ITC portion

Lowest dealer fees overall – no hidden credit card fees

Quick in home approvals with a paperless e-sign process

Optional automated “Yes Loan” for second look customers (down to 550 FICO)

True ‘no cost to dealer’ 8.99% TO 12.99% 5 to 12-year loan

Enrollment Requirements:

- 1 year in business & \$100K in annual sales
- B+ or better BBB / positive online reviews
- Positive trade references



5, 7, 10, 12, 15 & 20 year loan terms from 3.79%-12.99%

Loan Amounts from \$1,000 - \$100,000

3-18 month NO payment/NO interest “Same-As-Cash” loans

18 month interest only payment options (allows super low payment up front)

15 & 20 year loans with ability to Re-Amortize payment within first 5 years

Quick in home approvals with a paperless e-sign process

Easy funding through online Contractor Portal

True ‘no cost to dealer’ 12.99% 5 to 12-year loan

Enrollment Requirements:

- 1 year in business & \$100K in annual sales / \$50K net worth
- Decent credit for Business & Ownership
- Positive trade references

Traditional Installment Loans Risk Based (FICO Score Determines Interest Rate)					
Program Terms	Loan Term	Payment Factor	Loan Code	Contractor Fee	Loan Min - Max
8.99% - 12.99% Installment	3 Years	3.18% - 3.370%	No Code	0%	\$1,000 - \$65,000
8.99% - 12.99% Installment	5 Years	2.075% - 2.275%	No Code	0%	\$1,413 - \$65,000
8.99% - 12.99% Installment	7 Years	1.610% - 1.820%	No Code	0%	\$3,500 - \$65,000
8.99% - 12.99% Installment	10 Years	1.270% - 1.493%	No Code	0%	\$7,500 - \$65,000
8.99% - 12.99% Installment	12 Years	1.140% - 1.374%	No Code	0%	\$10,000 - \$65,000
Flex Installment Loan	Same as Above	Same as Above	TFRE23	0%	\$4,000 - \$65,000

Same-As-Cash Loans				
Program Terms	Loan Code	Flex Loan Code*	Contractor Fee	Loan Min - Max
3 Month No Payments / Same-As-Cash	RE462	N/A	4.11%	\$1,000 - \$65,000
6 Month No Payments / Same-As-Cash	RE573	REF38	4.32%	\$1,000 - \$65,000
12 Month No Payments / Same-As-Cash	RE468	REF59	6.27%	\$1,000 - \$65,000
18 Month No Payments / Same-As-Cash	RE759	REF26	8.52%	\$1,000 - \$65,000
24 Month No Payments / Same-As-Cash	RE782	REF24	11.32%	\$1,000 - \$65,000

2.99% 12 Year	29912YRR87	29912YRFRE65	20.10%	0.827%	\$10,000 - \$65,000
2.99% 12 Year PowerLoan†	29912YRPR36	29912YRFPR34	20.10%	0.827%	\$15,000 - \$65,000
3.99% 10 Year	39910YRR92	39910YRFRE57	15.45%	1.012%	\$7,500 - \$65,000
3.99% 12 Year	39912YRR52	39912YRFPR44	15.60%	0.875%	\$10,000 - \$65,000
3.99% 12 Year PowerLoan†	39912YRPR46	39912YRFRE37	16.10%	0.875%	\$15,000 - \$65,000
4.99% 5 Year	4995YRR25	4995YRFRE34	9.80%	1.887%	\$3,500 - \$65,000
4.99% 7 Year	4997YRR35	4997YRFRE86	11.50%	1.413%	\$3,500 - \$65,000
4.99% 10 Year	49910YRR45	49910YRFRE63	12.65%	1.060%	\$7,500 - \$65,000
4.99% 12 Year	49912YRR55	49912YRFRE45	13.85%	0.924%	\$10,000 - \$65,000
4.99% 20 Year†	49920YRR65	49920YRFRE87	16.00%	0.659%	\$12,000 - \$65,000
5.99% 20 Year†	59920YRR95	59920YRFRE57	13.25%	0.716%	\$12,000 - \$65,000
6.99% 5 Year	6995YRR89	6995YRFRE94	5.30%	1.980%	\$3,500 - \$65,000
6.99% 7 Year	6997YRR79	6997YRFRE76	6.50%	1.509%	\$3,500 - \$65,000
6.99% 10 Year	69910YRR69	69910YRFRE73	7.65%	1.161%	\$7,500 - \$65,000
6.99% 12 Year	69912YRR59	69912YRFRE35	8.35%	1.028%	\$10,000 - \$65,000
6.99% 20 Year†	69920YRR25	69920YRFRE97	8.25%	0.775%	\$12,000 - \$65,000

Combo Loans <small>To calculate a "blended" 30/70 combo loan contractor fee, use the formula: (SAC Fee x 30%) + (RIL Fee x 70%) = "blended fee"</small>					
Program Terms	Loan Code	RIL Contractor Fee	12 Mo SAC Contractor Fee	Payment Factor	Loan Min - Max
1.99% 7 Year Loan	CPZ9233	19.10%	6.27%	1.276%	\$3,500 - \$65,000
1.99% 10 Year Loan	CPZ9237	24.00%	6.27%	0.920%	\$7,500 - \$65,000
1.99% 12 Year Loan	CPZ9244	25.65%	6.27%	0.781%	\$10,000 - \$65,000
2.99% 7 Year Loan	CPZ9234	15.50%	6.27%	1.321%	\$3,500 - \$65,000
2.99% 10 Year Loan	CPZ9238	18.65%	6.27%	0.965%	\$7,500 - \$65,000
2.99% 12 Year Loan	CPZ9245	20.10%	6.27%	0.827%	\$10,000 - \$65,000
3.99% 10 Year Loan	CPZ9239	15.45%	6.27%	1.012%	\$7,500 - \$65,000
3.99% 12 Year Loan	CPZ9246	15.60%	6.27%	0.875%	\$10,000 - \$65,000
4.99% 7 Year Loan	CPZ9235	11.50%	6.27%	1.413%	\$3,500 - \$65,000
4.99% 10 Year Loan	CPZ9242	12.65%	6.27%	1.060%	\$7,500 - \$65,000
4.99% 12 Year Loan	CPZ9247	13.85%	6.27%	0.924%	\$10,000 - \$65,000
4.99% 20 Year Loan	CPZ9249	16.00%	6.27%	0.659%	\$12,000 - \$65,000
5.99% 20 Year Loan	CPZ9293	13.25%	6.27%	1.980%	\$12,000 - \$65,000
6.99% 7 Year Loan	CPZ9236	6.50%	6.27%	1.509%	\$3,500 - \$65,000
6.99% 10 Year Loan	CPZ9243	7.65%	6.27%	1.161%	\$7,500 - \$65,000
6.99% 12 Year Loan	CPZ9248	8.35%	6.27%	1.028%	\$10,000 - \$65,000
6.99% 20 Year Loan	CPZ9252	8.25%	6.27%	0.775%	\$12,000 - \$65,000

SERVICE FINANCE COMPANY, LLC				EGIA Loan Options						
Plan #		Deferred Interest With Scheduled Monthly Payments		Dealer Fee	Min Loan Amt	Max Loan Amt				
1006	6	Months, Deferred Interest with Minimum Monthly Payments		3.75%	\$1,000	\$100,000				
1012	12	Months, Deferred Interest with Minimum Monthly Payments		5.50%	\$1,000	\$100,000				
1018	18	Months, Deferred Interest with Minimum Monthly Payments		7.00%	\$1,000	\$100,000				
1024	24	Months, Deferred Interest with Minimum Monthly Payments		9.00%	\$1,000	\$100,000				
Plan #		Zero Interest / NO Monthly Payments- Same As Cash								
2003	3	Months, Zero Interest with NO Monthly Payments- Same as Cash		2.50%	\$1,000	\$100,000				
2006	6	Months, Zero Interest with NO Monthly Payments- Same as Cash		4.75%	\$1,000	\$100,000				
2012	12	Months, Zero Interest with NO Monthly Payments- Same as Cash		6.75%	\$1,000	\$100,000				
2018	18	Months, Zero Interest with NO Monthly Payments- Same as Cash		10.00%	\$1,000	\$100,000				
Plan #		Zero Interest With Equal Monthly Payments								
3025	25	Months, Zero Interest with 25 Equal Monthly Payments		10.25%	\$1,000	\$100,000				
3036	36	Months, Zero Interest with 36 Equal Monthly Payments		14.00%	\$1,000	\$100,000				
3048	48	Months, Zero Interest with 48 Equal Monthly Payments		16.50%	\$1,000	\$100,000				
3060	60	Months, Zero Interest with 60 Equal Monthly Payments		17.75%	\$1,000	\$100,000				
Plan #		Interest Rate		Loan Term		Payment Factor		Dealer Fee	Min Loan Amt	Max Loan Amt
4198		6.99%		60 Months		1.98%		6.00%	\$1,000	\$100,000
4202		7.99%		60 Months		2.02%		5.50%	\$1,000	\$100,000
4012		12.99%		84 Months (Max)		1.81%- 84 Months		0.00%	\$1,000	\$100,000
Plan #		Interest Rate		Loan Term		Payment Factor		Dealer Fee	Min Loan Amt	Max Loan Amt
4092		4.99%		144 Months		0.92%		12.00%	\$3,000	\$100,000
4116		6.99%		120 Months		1.16%		7.25%	\$3,000	\$100,000
4121		7.99%		120 Months		1.21%		6.50%	\$3,000	\$100,000
4132		9.99%		120 Months		1.32%		4.05%	\$3,000	\$100,000

RENEWABLE LOAN OPTIONS ONLY BELOW:

For Renewable Loans below, customers are allowed to make a lump sum payment and re-amortize the loan anytime within the first 5 years. Minimum amount down required to re-amortize the loan is 20% of the initial loan balance.

SERVICE FINANCE COMPANY, LLC				EGIA Renewables Project Options			
Plan #	Interest Only And Reduced Rate For The Life Of The Loan			Payment Factor	Dealer Fee	Min. Loan Amt	Max. Loan Amt
6091	18 Month Interest Only / 4.79% 144 Months (162 Month Loan)			0.39% / 0.91%	12.50%	\$10,000	\$75,000
6072	18 Month Interest Only / 3.79% 180 Months (198 Month Loan)			0.31% / 0.72%	18.50%	\$15,000	\$75,000
6078	18 Month Interest Only / 4.79% 180 Months (198 Month Loan)			0.39% / 0.78%	14.00%	\$15,000	\$75,000
6083	18 Month Interest Only / 5.79% 180 Months (198 Month Loan)			0.47% / 0.83%	12.00%	\$15,000	\$75,000
6059	18 Month Interest Only / 3.79% 240 Months (258 Month Loan)			0.31% / 0.59%	20.00%	\$15,000	\$75,000
6064	18 Month Interest Only / 4.79% 240 Months (258 Month Loan)			0.39% / 0.64%	16.00%	\$15,000	\$75,000
6070	18 Month Interest Only / 5.79% 240 Months (258 Month Loan)			0.47% / 0.70%	14.00%	\$15,000	\$75,000

Express Loan Program Mobile App & Links to Prequalify on Your Website

EnerBank USA Contractor

By EnerBank USA

This app is only available on the App Store for iOS devices.



+ This app is designed for both iPhone and iPad

Free

Category: [Finance](#)
Updated: Aug 22, 2017
Version: 2.0
Size: 56.1 MB
Language: English
Seller: EnerBank USA
© 2017 EnerBank USA
Rated 4+

Compatibility: Requires iOS 9.0 or later. Compatible with iPhone, iPad, and iPod touch.

Description

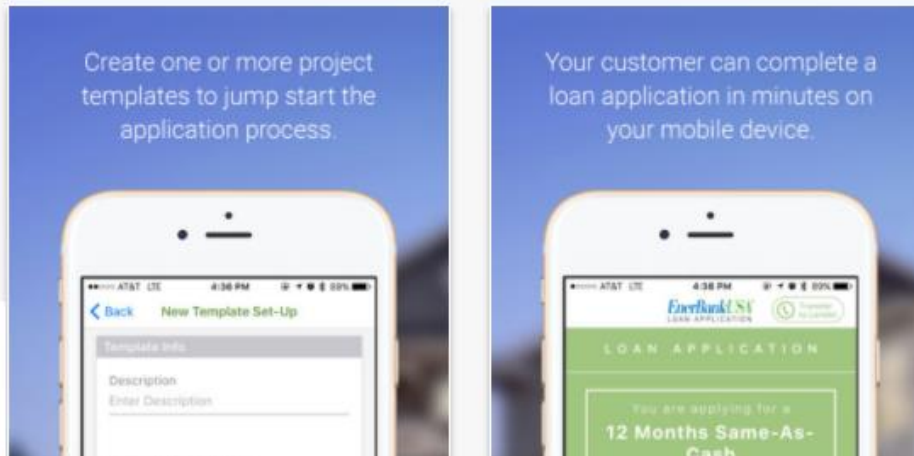
EnerBank USA, America's Home Improvement Lender of Choice, now offers a new choice—mobile. As an authorized contractor with EnerBank USA, you have a new choice to offer your customer.

[EnerBank USA Web Site](#) > [EnerBank USA Contractor Support](#) >

What's New in Version 2.0

- Prompt single applicant to add a co-applicant when needed.
- Bug fixes & minor UX improvements

Screenshots



Financing can also be added to the company website for easy access to pre-approval.

12 Month
Same-As-Cash*
No payments, No interest for 12 months

[Start My Project Today!](#)

Member **EnerBankUSA**

6.99%^{APR}
7 Year Loan*

[Start My Project Today!](#)

Member **EnerBankUSA**

Express Loan Program Mobile App Loan Process

EnerBank USA Contractor

By EnerBank USA

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Free

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© 2017 EnerBank USA

Rated 4+

Compatibility: Requires iOS 9.0 or later. Compatible with iPhone, iPad, and iPod touch.

Description

EnerBank USA, America's Home Improvement Lender of Choice, now offers a new choice—mob

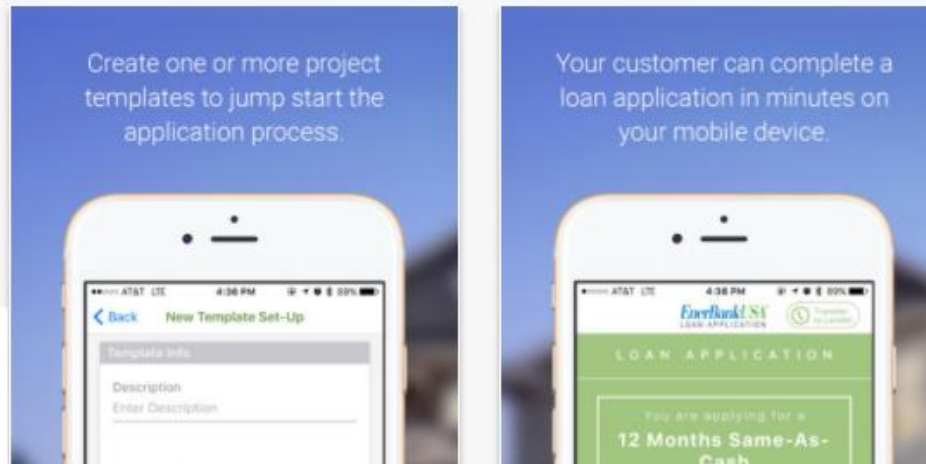
As an authorized contractor with EnerBank USA, you have a new choice to offer your customer

[EnerBank USA Web Site](#) > [EnerBank USA Contractor Support](#) >

What's New in Version 2.0

- Prompt single applicant to add a co-applicant when needed.
- Bug fixes & minor UX improvements

Screenshots



Express Loan Program Mobile App Loan Process

iPad 10:55 AM 72%

[Back](#) EnerBankUSA LOAN APPLICATION

Eligibility **Loan Info** Applicant Review

Program Info Step 1 of 3

Program Phone Number
EnerBank Loan by Phone Number

Contractor ID
EnerBank Contractor ID

Loan Code
EnerBank Loan Code

Loan Amount
Total Loan Amount

NEXT >

Cancel Application

Express Loan Program Mobile App Loan Process

iPad 9:23 AM 100%

[Back](#) **EnerBankUSA**
LOAN APPLICATION

Eligibility Loan Info Applicant Review

Applicant Eligibility

Ownership/Residency Status
Choose One

Property Type
Choose One

NEXT >

Cancel Application

Express Loan Program Mobile App Loan Process

The screenshot shows the 'Loan Purpose' screen in the EnerBankUSA mobile app. At the top, a progress bar indicates four steps: Eligibility (checked), Loan Info (current step), Applicant, and Review. The screen title is 'Loan Purpose' and it is labeled 'Step 3 of 3'. A light blue selection bar at the top contains a green checkmark and the text 'Traditional Installment Loan'. Below this, there are two input fields: 'Project Type' with the value 'Select' and 'Salesperson' with the value 'Unassigned'. A 'NEXT >' button is centered at the bottom of the form area. At the very bottom of the screen, there is a red link that says 'Cancel Application'.

9:24 AM 100%

Back

EnerBankUSA
LOAN APPLICATION

Eligibility Loan Info Applicant Review

Loan Purpose Step 3 of 3

Traditional Installment Loan

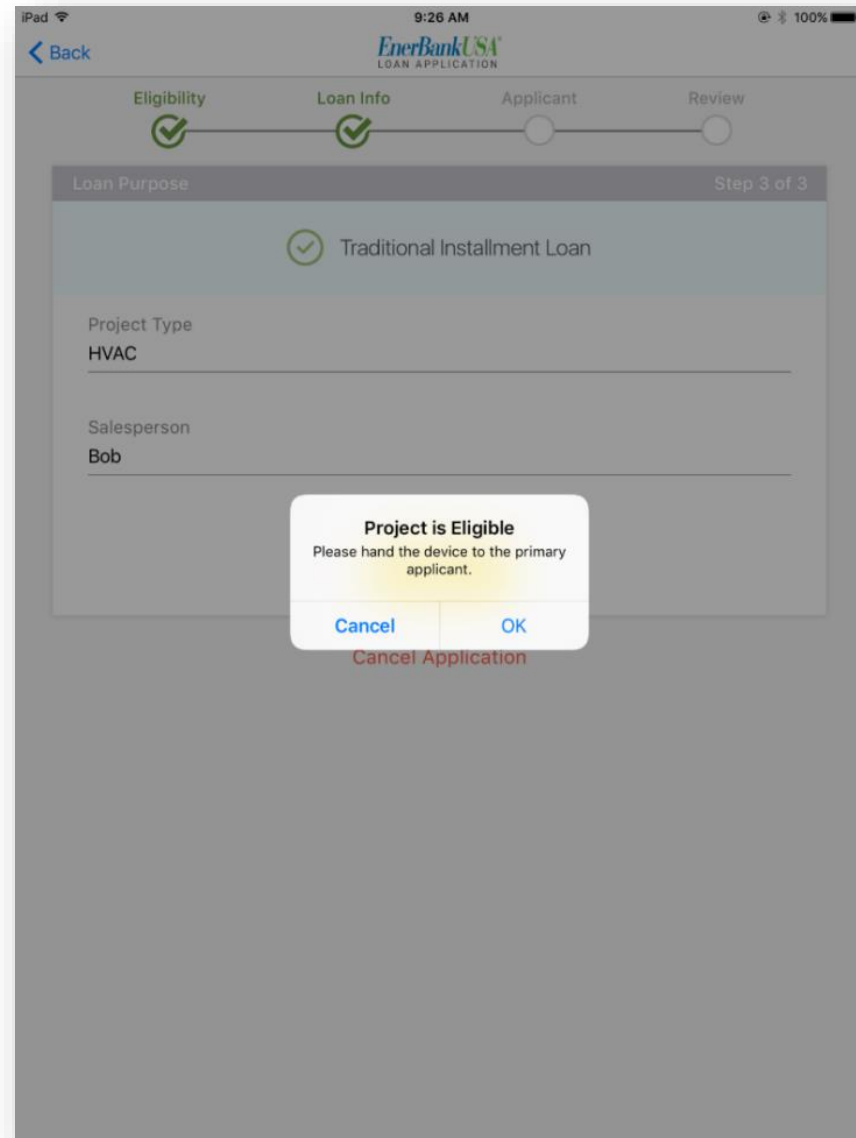
Project Type
Select

Salesperson
Unassigned

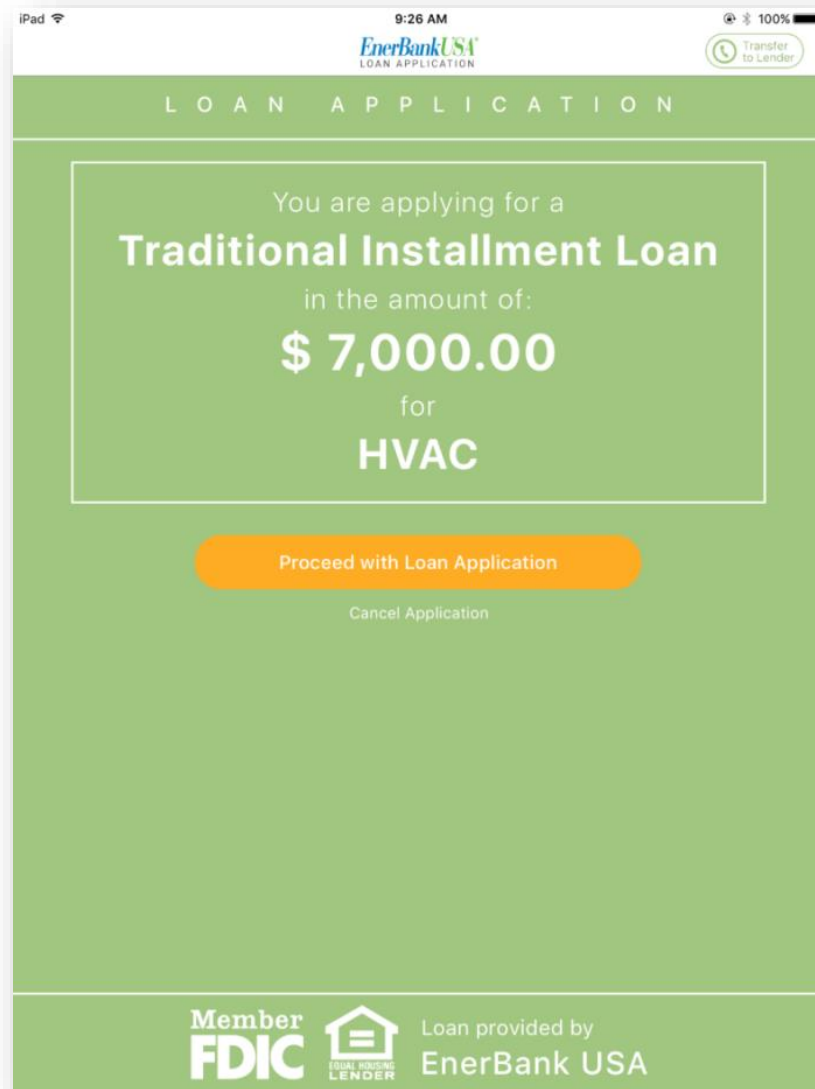
NEXT >

Cancel Application

Express Loan Program Mobile App Loan Process



Express Loan Program Mobile App Loan Process



Express Loan Program Mobile App Loan Process

iPad 9:27 AM 99%

[Back](#) **EnerBankUSA** [Transfer to Lender](#)
LOAN APPLICATION

Personal Info Employment Info Review & Submit

Applicant Info Step 1 of 2

Quickly pre-fill personal info

[Scan License](#)

ADDITIONAL APPLICANT

Will you have a co-applicant?
No

PRIMARY APPLICANT INFO

First Name
Enter Name

Last Name
Enter Name

Suffix
Choose One

Date of Birth
8/9/1999

Social Security Number ⓘ
•••-•••-•••• [Show SSN](#) 👁

Preferred Phone
(000) 000-0000

Express Loan Program Mobile App Loan Process

12:46 PM 65%

[Back](#) **EnerBankUSA** [Transfer to Lender](#)
LOAN APPLICATION

To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify and record information that identifies each person who opens an account.

What this means for you: when you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

Loan Documents

Loan Document Delivery Method ⓘ
Delivered by Contractor

Consent for Mark Thomas

READY TO APPLY?

I certify and agree that: (a) I am providing the information herein to EnerBank USA ("the Bank") in order to apply for a loan; (b) the information provided is true, correct, and complete to the best of my knowledge; (c) the Bank is authorized to verify the information provided in this application and to make any investigations regarding such information which may include, without limitation, obtaining a consumer credit report; (d) I am applying for the loan on my own behalf and not on behalf of any other person; (e) I give the Bank permission to share my application information and credit decision with my contractor and its loan program sponsor; and (f) that I am a U.S. resident.

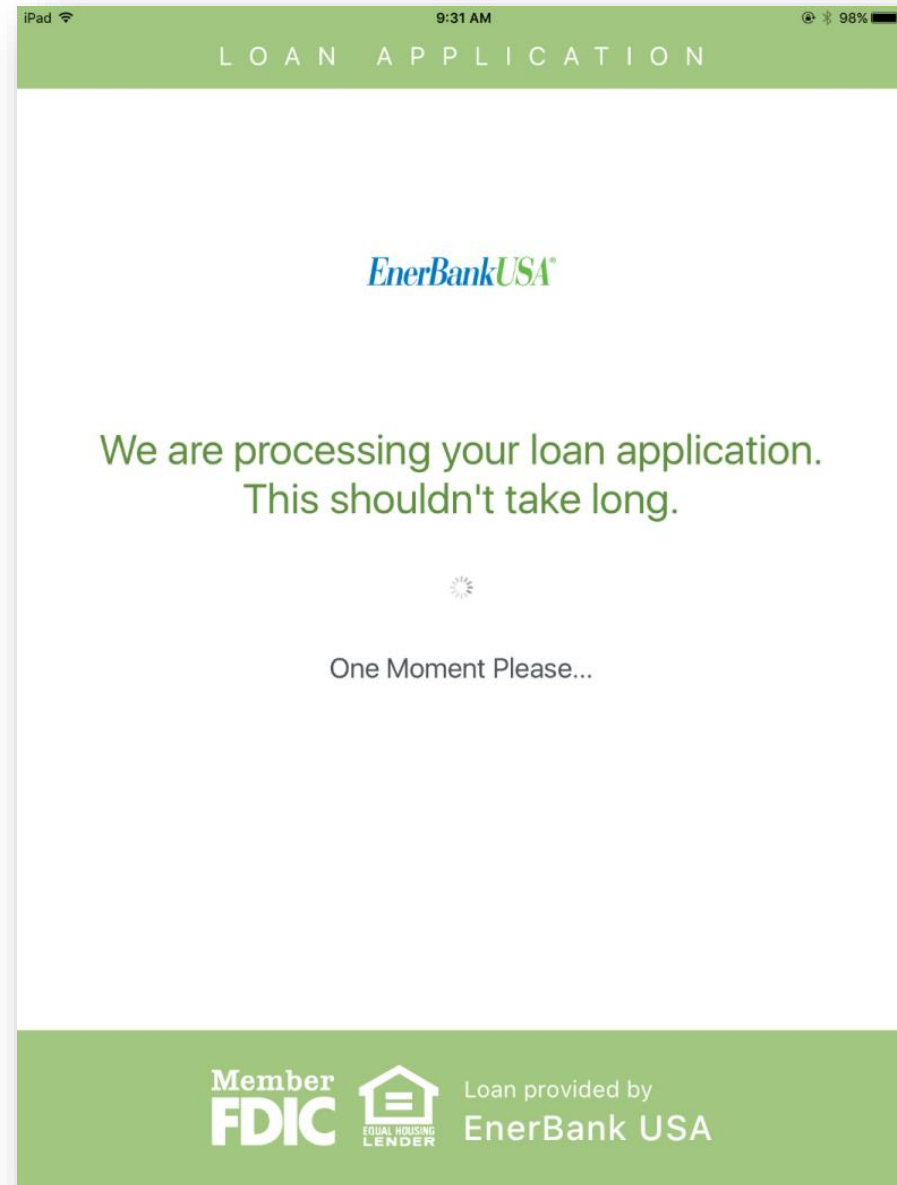
California Residents: If married, you may apply for a separate account.

I verify I have entered all the information above correctly. I have read and agree to all consents and agreements.

SUBMIT

[Cancel Application](#)

Express Loan Program Mobile App Loan Process



Express Loan Program Mobile App Loan Process

9:31 AM 98%

EnerBankUSA
LOAN APPLICATION

✓ Congratulations! Your loan application has been approved. Please review the details of your loan and contact our Lending Department with any questions.

1 (857) 575-7575

APPLICATION STATUS APPROVED	APPLICATION NUMBER 3000000483
---------------------------------------	---

LOAN TYPE
Traditional Installment Loan
in the amount of:
\$ 20,000.00

LOAN TERM 144 months	APR 9.99% fixed
--------------------------------	---------------------------

ESTIMATED MONTHLY PAYMENTS
\$ 239.00

This is the approval verbiage for bank product number 01, which is a Traditional Installment Loan product.

CLOSE

Express Loan Program Mobile App Loan Process

The screenshot shows the EnerBank USA mobile app interface. At the top, the status bar indicates 'iPad', signal strength, '9:32 AM', and '98%' battery. The app header features the 'EnerBank USA' logo and 'LOAN APPLICATION'. A green checkmark icon is next to the text: 'Congratulations! Your loan application has been approved. Please review the details of your loan and contact our Lending Department with any questions.' Below this is the phone number '1 (857) 575-7575'. The main content area is a list of loan details: 'APPLICATION STATUS APPROVED', 'NUMBER 483', 'LOAN TYPE Traditional Installment in the amount of: \$ 20,000.00', 'LOAN TERM 144 months', and 'ESTIMATED MONTHLY PAYMENTS \$ 239.00'. A pop-up message titled 'You're all done!' is centered over the screen, providing next steps and a 'CLOSE' button. At the bottom of the app screen is a large orange 'CLOSE' button.

9:32 AM 98%

EnerBank USA
LOAN APPLICATION

✓ Congratulations! Your loan application has been approved. Please review the details of your loan and contact our Lending Department with any questions.

1 (857) 575-7575

APPLICATION STATUS	NUMBER
APPROVED	483
LOAN TYPE	
Traditional Installment in the amount of:	
\$ 20,000.00	
LOAN TERM	
144 months	
ESTIMATED MONTHLY PAYMENTS	
\$ 239.00	

This is the approval verbiage for bank product number 01, which is a Traditional Installment Loan product.

You're all done!
Thanks for completing your loan application! Here's what happens next:
We'll send out your loan documents via the method you requested in your application. The packet includes full details of your loan and instructions for the signature process.
Your loan approval is valid for 120 days from the date of application.
For additional information, to change your document delivery method, or if you have any questions about your loan status, please contact a lending specialist at 1 (857) 575-7575.

CLOSE

CLOSE

Customer Signs Loan Docs To Initiate Funding

Customer Signature

Dear Mr. Smith,

The loan documents for your loan are available at the link (URL) below to access them.

<https://portal.enerbank.com>

If clicking the link does not work, please contact our Loan Operations Center at 888-722-3333.

Sincerely,

EnerBank USA
Loan Operations Center

EnerBankUSA® Hello EXP Test | Logout

Documents

Payment Authorization Form

Withdraw my consent

Reference Documents:

EnerBankUSA®

PAYMENT AUTHORIZATION FORM

LOAN AMOUNT: **\$5,000.00** LOAN NUMBER: 2340052078

You are almost finished! If you are done please click Submit Documents to send them back to your financial institution or click Continue Reviewing to submit at a later time.

After submitting the documents, you will be able to view and print the documents but will not be able to make any changes.

[Submit Documents](#) [Continue Reviewing](#)

the Contractor, and if any installation was included in the contract, there has been satisfactory completion of such installation.

3. Represent and warrant that the loan proceeds will be used only as set forth in the Note.
4. Instruct EnerBank USA to disburse to Contractor the proceeds of this loan in the amount of Five Thousand Dollars & Zero Cents.

Borrower Date

EXP Test

_____ Borrower _____ Date

AUTHORIZATION NUMBER: 13236416

Documents

Payment Authorization Form

Payment Authorization Form

Next

Submit



Dealer Signs Loan Docs To Complete Funding

Contractor Signature

Dear Transparent Windows, LLC

EXP Test has completed the eSign below to review and eSign the Pay

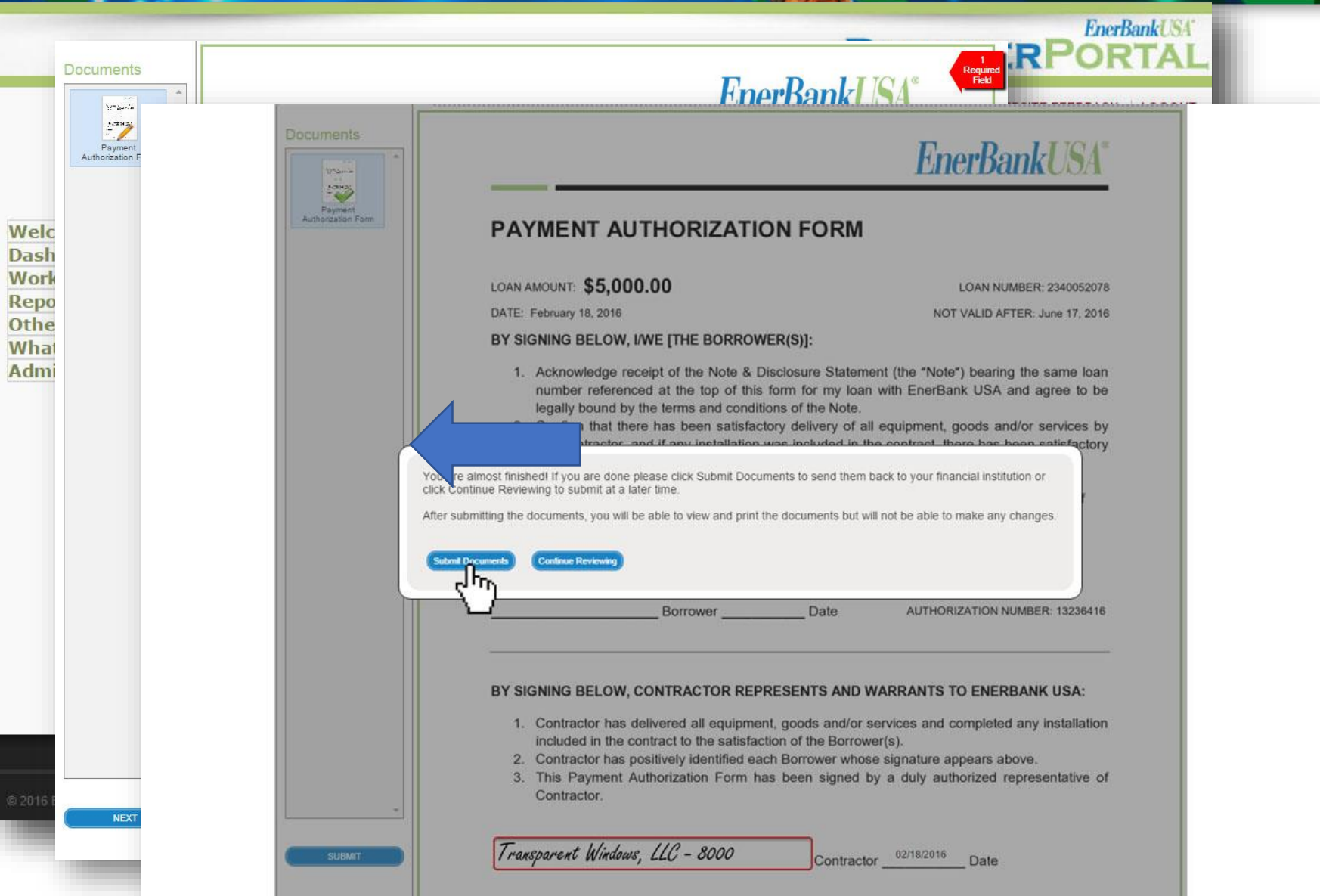
<https://portal.enerbank.com/Partner>

If clicking the link does not work,

Please call us at 888-724-3552 with

Sincerely,

EnerBank USA
Loan Operations Center



EnerBankUSA PARTNER PORTAL

EnerBankUSA

PAYMENT AUTHORIZATION FORM

LOAN AMOUNT: **\$5,000.00** LOAN NUMBER: 2340052078
DATE: February 18, 2016 NOT VALID AFTER: June 17, 2016

BY SIGNING BELOW, I/WE [THE BORROWER(S)]:

- Acknowledge receipt of the Note & Disclosure Statement (the "Note") bearing the same loan number referenced at the top of this form for my loan with EnerBank USA and agree to be legally bound by the terms and conditions of the Note.

You are almost finished! If you are done please click Submit Documents to send them back to your financial institution or click Continue Reviewing to submit at a later time.

After submitting the documents, you will be able to view and print the documents but will not be able to make any changes.

_____, Borrower _____ Date AUTHORIZATION NUMBER: 13236416

BY SIGNING BELOW, CONTRACTOR REPRESENTS AND WARRANTS TO ENERBANK USA:

- Contractor has delivered all equipment, goods and/or services and completed any installation included in the contract to the satisfaction of the Borrower(s).
- Contractor has positively identified each Borrower whose signature appears above.
- This Payment Authorization Form has been signed by a duly authorized representative of Contractor.

Transparent Windows, LLC - 8000 Contractor 02/18/2016 Date

Sign Up Process

Sign up now at: www.egia.org/climatemaster



To learn more call: 866-797-7343
or email: saveenergy@egia.org

[GEOTHERMAL LOAN OPTIONS](#)

[ADDITIONAL FINANCING PROGRAMS](#)

[EGIA MEMBERSHIP](#)

GEOTHERMAL FINANCING FOR CLIMATEMASTER DEALERS

EGIA, a national non-profit contractor association, is the exclusive provider of the GEOSmart Financing Clearinghouse which delivers the industry's leading financing solutions for energy-efficiency and renewable energy installations. As a ClimateMaster dealer, you are eligible to enroll in any of EGIA's GEOSmart Financing Programs. The GEOSmart Financing Programs are designed to help you sell higher efficiency projects by giving your customers low monthly payment options, or no interest no payment options. See below for specific program highlights, rate sheets, and enrollment forms.



[Financing for Canadian Contractors Available](#)
[Click Here for More Details](#)

GEOTHERMAL FINANCING OPTIONS

Flex Loan Program

Access multi
loans, no int
projects that

No proof of income is needed on unsecured loans under \$15,000. This

Express Loan Program

and no interest / no monthly payment programs.

to financing.
funding is
monthly payments

WWW.EGIA.ORG/CLIMATEMASTER

Last Thoughts on Financing

- You're in the business to sell more equipment not parts. Financing makes that possible.
- On average, consumers spend 20% more when using financing.*
- Plan ahead – choose plans to attract both cash and payment customers.
- Train sales team and use point of sale materials to make it easy to offer financing. EGIA and/or Distributor TM can help.
- Don't forget to UPSELL and use Energy Savings to offset a higher monthly payment vs a conventional system!

*Based on over \$5 Billion of residential funded loan volume across EGIA's platform of lenders.

Rob Noll

General Manager

Phone: (865) 207-6834

Email: rnoll@egia.org



www.egia.org/climatemaster

Questions on Financing?



NEW Products



Joe Ferron & Joe Parsons
ClimateMaster Product Management

Introducing...

Dry Fluid Cooler

Packaged Rooftop Units

Trilogy VE

Thermostats

Introducing Dry Fluid Cooler



Dry Fluid Cooler

- **Proven Product**
 - Specialty Applications
- **Design Features**
 - Vertical Discharge
 - Ultra-Quiet Fan
- **Function**
 - Dissipates heat of rejection
- **Construction**
 - Heavy gauge powder coated steel
- **Residential Capacities**
 - 3.5 and 5 ton



Market Opportunities

- Cooling dominant climates
- Works in conjunction with ground loops
- Reduces overall cost of installation
- Improves system performance
- Eliminates loop in water source applications
- Rescue unit for underperforming loops
- Temporary solution for emergency system replacement
- Design advantage

A Solution to Meet Multiple Applications with Flexibility




- Engineering design improvements underway
- Available Q4 2019
- Final Pricing TBD



NEW! Packaged Rooftop Units

Air-Cooled

New!!! ClimateMaster Packaged RTU's

Platform	Product	Capacity Range	Models	
Commercial Package	GE AC HP	3-6 Ton 3-6 Ton 3-6 Ton	RKPN, RKQN RLPN, RLQN RJPL	
Commercial Package	GE AC HP	7.5-12.5 Ton 7.5-12.5 Ton 7.5-10 Ton	RGED RACD RJNL	
Commercial Package	GE AC	15-25 Ton 15-25 Ton	RKNL, RKRL RLNL, RLRL	

Dependability: Nationally recognized quality leader

Efficiency: 2 Levels of efficiency: 14 and 15 SEER or 12.9–14.8 IEER

Capacity: Strong nominal capacities 3–25 tons

Cabinet Size: Competitive size and weights

Price: Competitive price in each category

Package Gas Electric

RKPN – 14 SEER

RKQN – 15 SEER

Package Air Conditioners

RLPN – 14 SEER

RLQN – 15 SEER

Package Heat Pumps

RJPL – 14 SEER

Cooling Capacities

4 Capacities (3 – 5 Ton)

Heating Capacities

Heat Inputs (80 - 135 Kbtuh)

Heat Inputs (5 – 20 Kw)

Voltages

208/230 Volt Single & Three Phase

460 Volt Three Phase

Cabinet Size

48 1/8 x 76 1/4 x 35 (WxLxH)



Standard Features

100% Scroll

External Gauge Ports

Convertible Airflow

Factory Options

High and Low Pressure

Direct or Belt Drive

Serviceability

Ease of Installation

Reliability

Dual 7-Segment LED Display
delivers enhanced diagnostics with easy-to-understand fault codes.

Qwik-Change Flex-Fit Rack
Allows easy changeover between 2" and 4" filters with standard and readily available sizes.

Hot Gas Reheat
The first in the dehumidification market to incorporate a VFD that operates at a lower speed on first-stage cooling, when in reheat mode and when operating in occupied fan mode; this saves energy, enhances performance and increases comfort.

External Lockable Gauge Ports
Provides the ability to measure operating pressures without opening the cabinet door and without affecting the performance of the unit.

Condenser Coil Protection
Our optional factory-installed, pre-coated condenser coils are designed to withstand the harshest environments, minimizing downtime.

Improved Footprint
Drop-in replacement eliminates the need for a new curb adapter—cutting installation time in half for substantial cost savings.

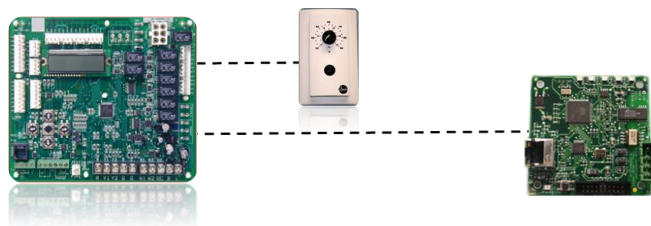
Qwik-Slide Blower Assembly
Extremely easy access and removal of blower assembly to service internal components, such as blower motor, TXV and microchannel coil.

Qwik-Clean Drain Pan
Composite material pan that slides out completely for easy cleaning and features a standard overflow sensor.



CONTROL BOX FEATURES

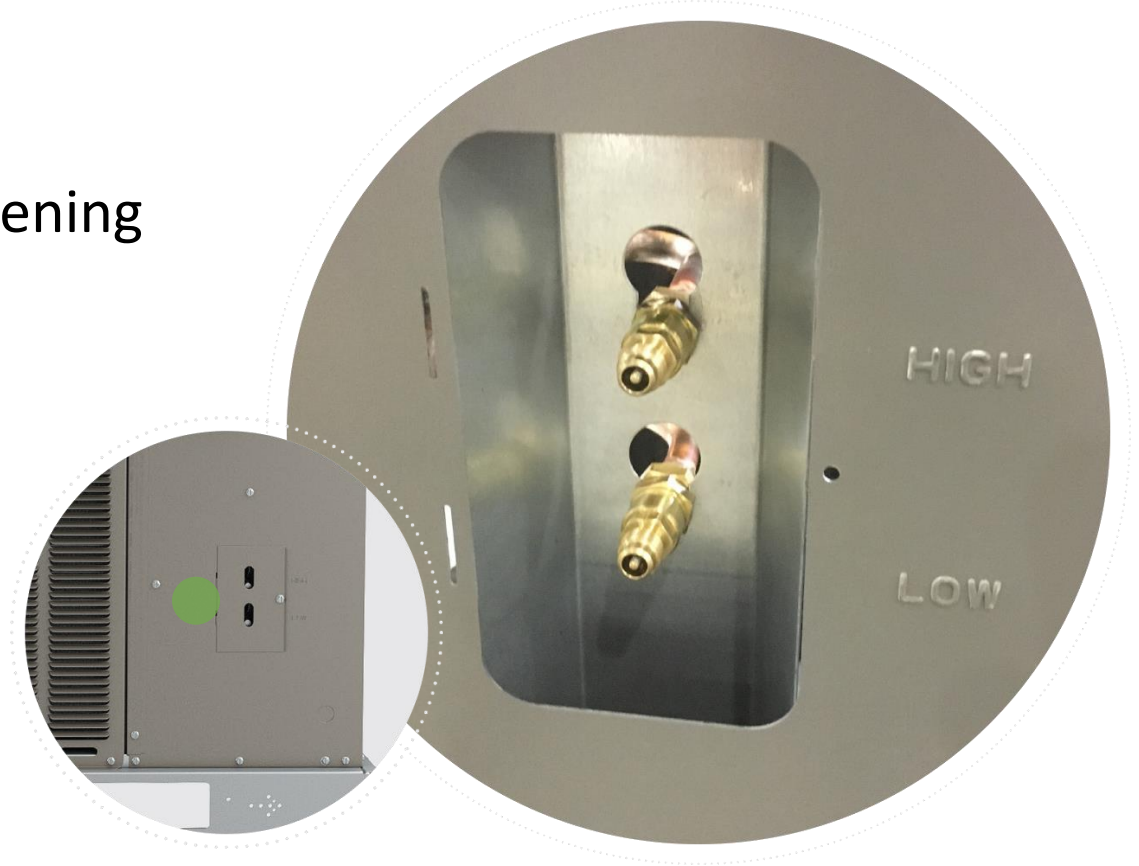
Feature	Benefit
Integrated Furnace Control (IFC) with “three-strikes you’re out” refrigerant high and low pressure switch inputs instead of manual-reset high pressure and auto-reset low pressure switch. Refrigerant low pressure switch input has built in time delay to ignore transient conditions.	Reduced nuisance trips and call backs
Dual 7-segment LED with diagnostics for heating and cooling alarms & 43 status / fault codes that provide warning/problem/shutdown status	Quicker, more accurate diagnostics
Push button for retrieval of last 10 faults	More complete history of unit malfunctions
Additional Inputs - <ul style="list-style-type: none"> • Occupancy input “OCC” and economizer alarm “L” output to meet California Title 24 requirements • Input for external smoke detector and remote unit shutdown • Input for clogged condensate drain sensor 	Application flexibility to meet building compliance needs
Input for Comfort Alert phase monitor(s) - plug and play	Easy field installation and protection
Output for 2-speed indoor fan VFD (California Title 24 without Dedicated Digital Control).	Allows for field installation of VFD, both CC and Non-CC
L Terminal output for system fault notification	Thermostat alert for faults and building code compliance



FEATURE:

EXTERNAL LOCKABLE GAUGE PORTS

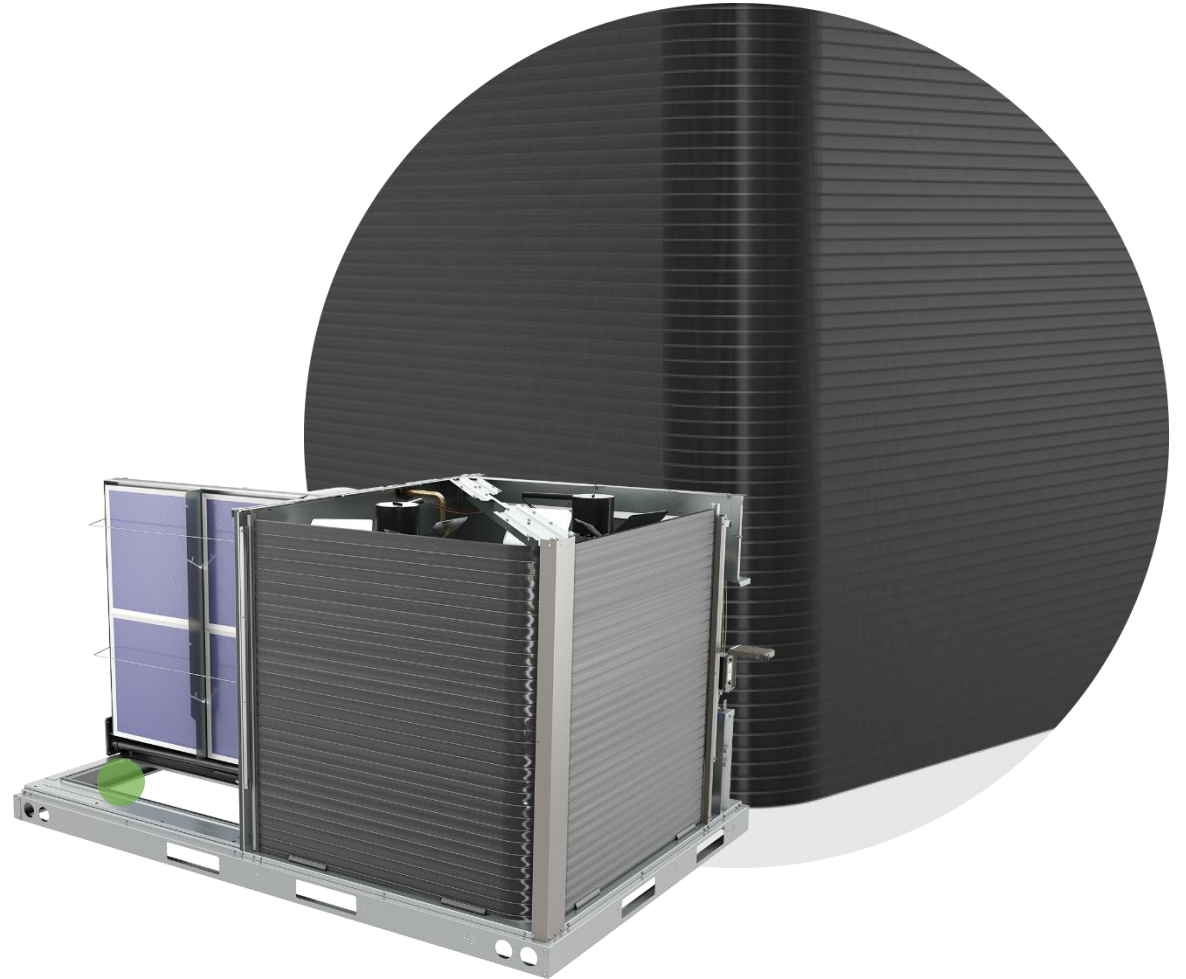
- Measure operating pressures without opening cabinet door
 - Saves time and service costs
- Meets applicable codes



FEATURES:

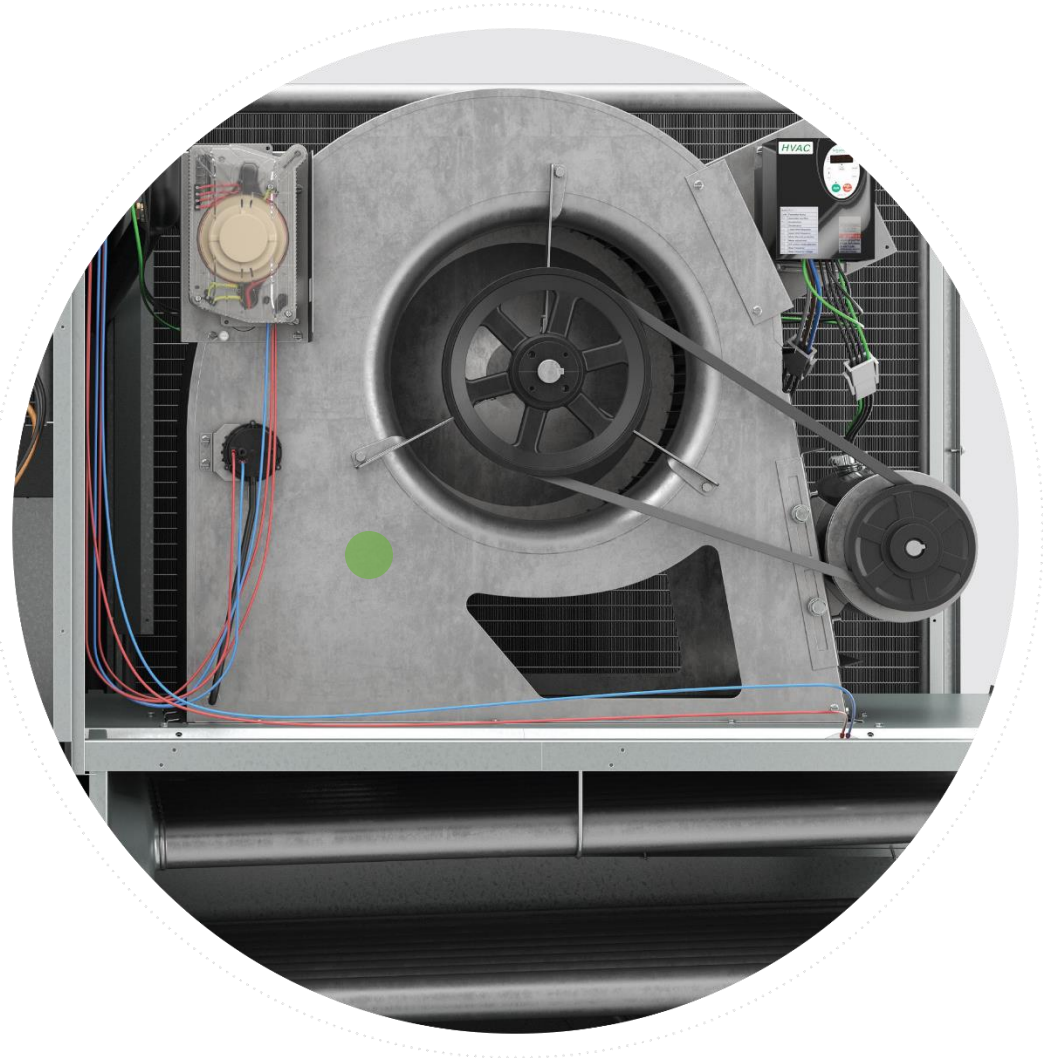
THE LATEST MICROCHANNEL TECHNOLOGY WITH CONDENSOR COIL COATING

- Superior heat transfer
 - Improved thermal efficiency
 - Increased surface area
- Up to 60% less refrigerant (avg.)
- Optional factory-applied coil coating for superior corrosion resistance
- Outdoor coils operate in the harshest of environments
 - More dependable than your competition

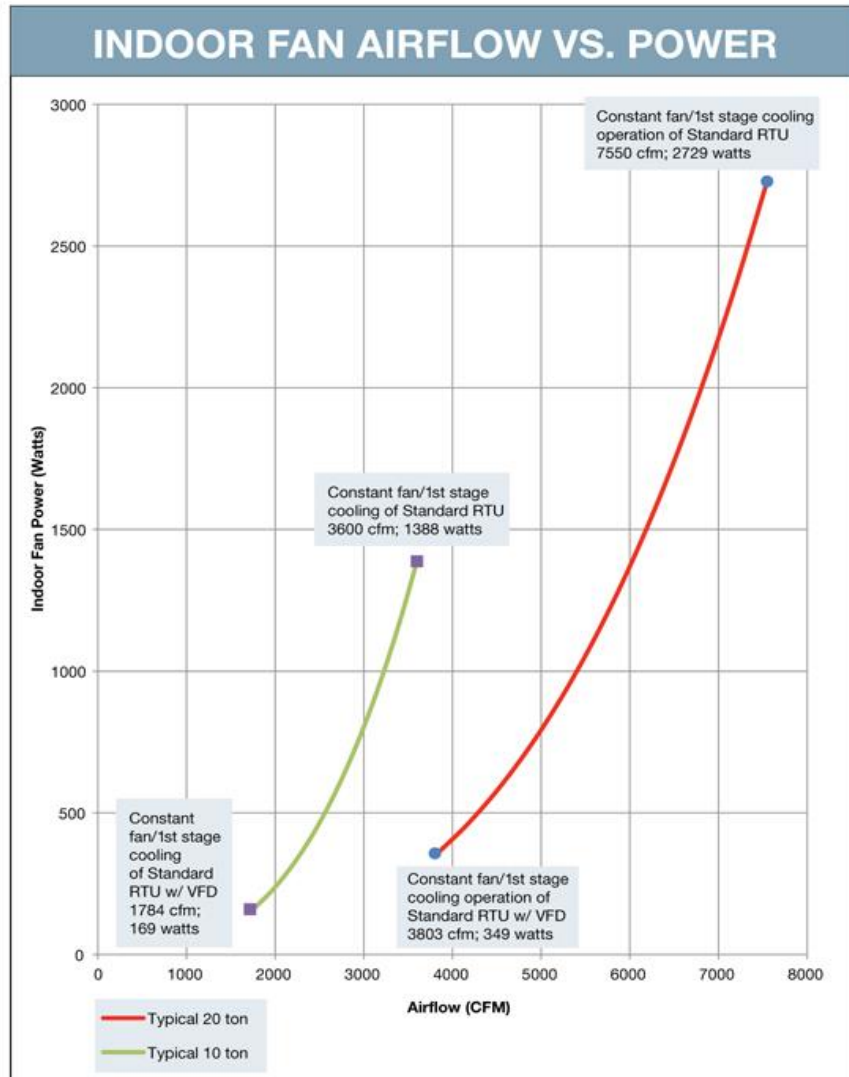


QWIK-SLIDE BLOWER ASSEMBLY

- Extremely easy removal and maintenance of blower assembly
 - Saves time and money
- Slides out fully by removal of three screws and can be set to the side to access internal components
- Self-aligning, gravity-assisted belt tensioning
 - Fewer call-backs



BOLD EFFICIENCY. BIG SAVINGS.



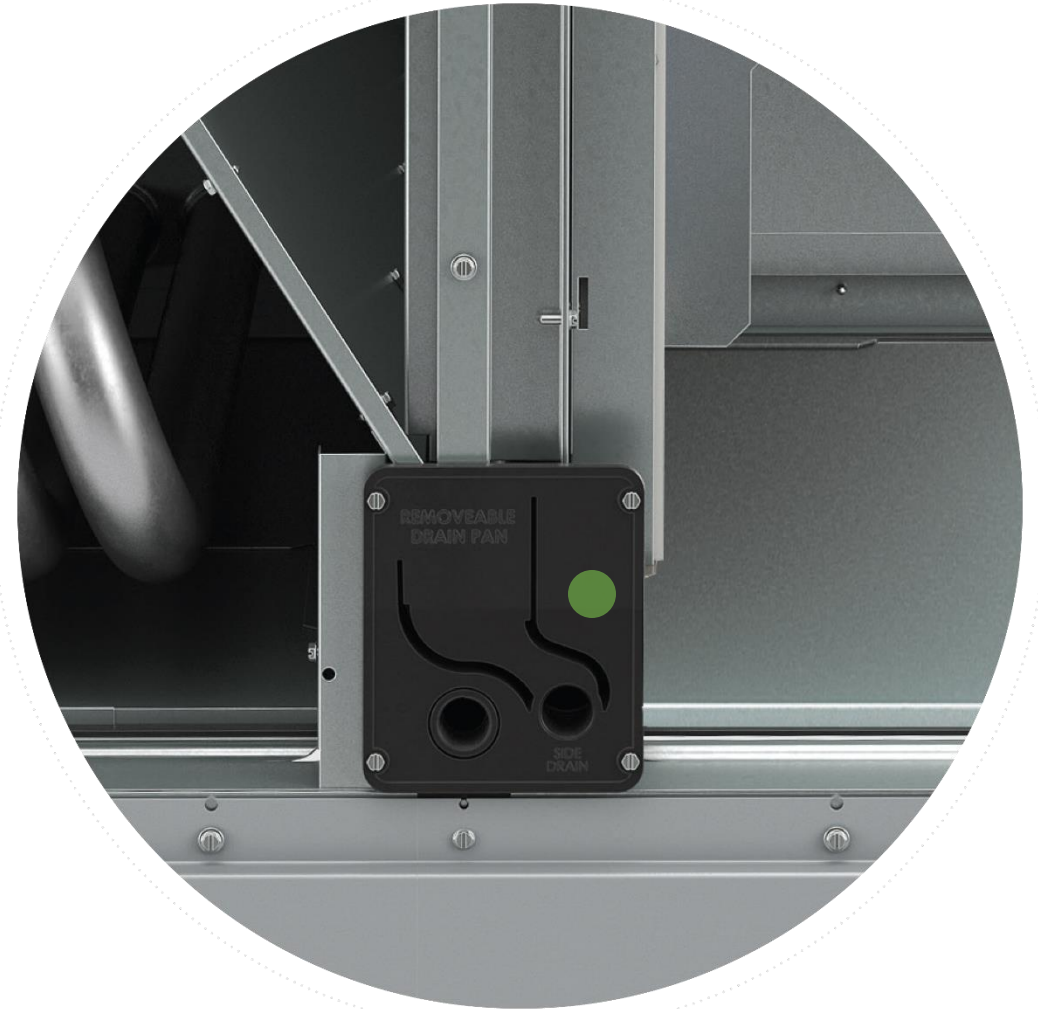
Why VFD?

- Allows for reduced airflow
 - Fan only
 - First-stage cooling
 - Specific Reheat applications
 - Dramatically increases efficiency
- Reduction in airflow-associated noise
 - Reduced velocity on low speed
 - Softer start
 - Ramp up



SLIDE OUT DRAIN PAN

- Anti-microbial composite material drain pan that fully slides out for easy cleaning
 - Saves time and money
- Flexibility for center or side drain
 - Simplifies installation
- Features a standard overflow sensor
 - Protected from costly water damage



THE SCIENCE OF DEHUMIDIFICATION

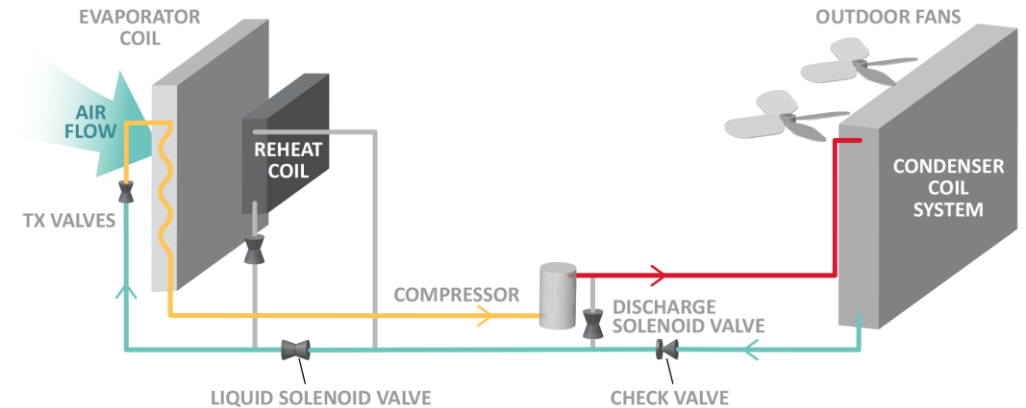
Hot gas reheat delivers a high degree of energy savings, performance and comfort by:

- Controlling temperature and humidity independently
- Removing humidity from the conditioned space after meeting cooling requirements
- Reducing latent heat in the occupied space when there is no sensible load without overcooling or overheating the space

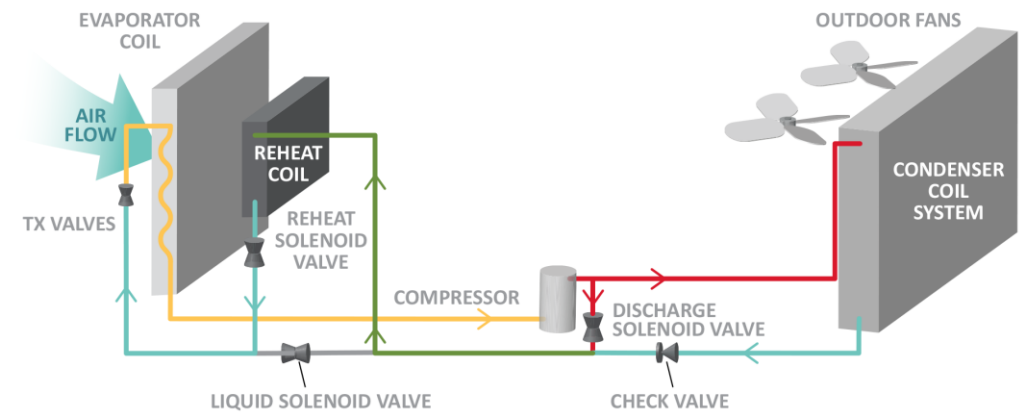
Customer Benefits

- Maintains humidity levels between 40-60%
- Delivers up to 51% more moisture removal during first stage of cooling
- Dehumidification mode can deliver up to 66% more moisture removal than standard rooftop

COOLING MODE



DEHUMIDIFYING MODE



— Hot Temperature Vapor
 — Two Phase (Liquid Vapor Mix)
 — Liquid
 — Low Temperature Vapor

QWIK-CHANGE FLEX-FIT RACK

- Easy changeover between 2" and 4" standard size filters (20" x 20")

Note – 4" filter not available for units installed with economizers.

- Allows ability to upgrade IAQ filtration without additional hardware costs



ClimateMaster RTU's: Standard Features:

Feature

- One piece top
- 1" Drip lip
- Side or bottom utility access
- Hinged / ¼ turn service access
- Electrical divider plate
- Oversize electrical diagram
- Charging chart
- Service
- Internal model / serial number
- Large electrical panel
- Slide out filters / rack system
- Sloped / slide out drain pan
- External gauge ports

Benefit

- Reliability
- Reliability
- Installation
- Service
- Service
- Service
- Service
- Service
- Service / installation
- Service
- Service
- Service

Feature

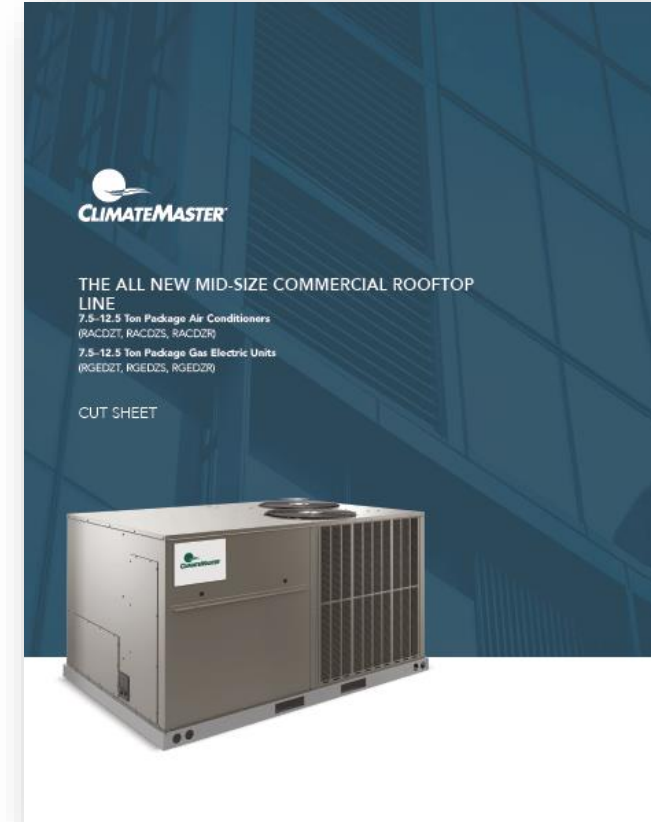
- External pressure re-set Service
- Stamped identifiers
- Color coded wiring
- Slide out blower deck
- Adjustable pulley
- Glued AND pinned insulation
- Full perimeter base rail
- Forked from 3 sides
- Lifting lug connections
- Large compressor / coil access
- Removable fan assembly Service
- "Shaft down" condenser motor
- Vertical or horizontal application
- 1 1/8" raised / rolled lip base pan

Benefit

- Service
- Service
- Service
- Service
- Reliability
- Installation
- Installation
- Reliability
- Service
- Reliability
- Installation
- Reliability



- **Launch**
 - **Launch and first ship 3Q 2019**
- **Pricing**
 - **Pricing available 3Q 2019**
- **Literature**
 - **Cut sheets for 7.5 - 12.5 ton currently available**
 - **3-7.5 ton and greater than 12.5 ton available June 2019**
- **Social Media – 3Q 2019**
 - **Facebook**
 - **Twitter**
 - **Enews**
 - **LinkedIn**
- **Sales and technical training**
 - **1st training July 2019**



Introducing Trilogy VE



- Developed on the proven QE platform
- Highest Efficiency



ENERGY STAR CERTIFIED

Geothermal Heat Pumps

Climatemaster - Trilogy : VED0930

Specifications

Brand Name:	Climatemaster
Model Name:	Trilogy
Model Number:	VED0930
Type:	Closed Loop Water-to-Air
COP Rating:	4.3
Energy Efficiency (EER) :	33.7

- Large Residential
- Multi-Unit
- Single QE provides hot water
- Zoning
- Performance
 - QE Level of Performance



Similarities and Differences

- Familiar Components
 - Speed Compressor
 - Variable Speed Fan
 - Variable Water Flow
- Familiar Configurations
 - Upflow
 - Downflow
 - Horizontal
- Differences
- No Hot Water Generator
- Lower Price



 **iGate**[®]
monitor. control. diagnose.

vFLOW[®]
Variable Water Flow

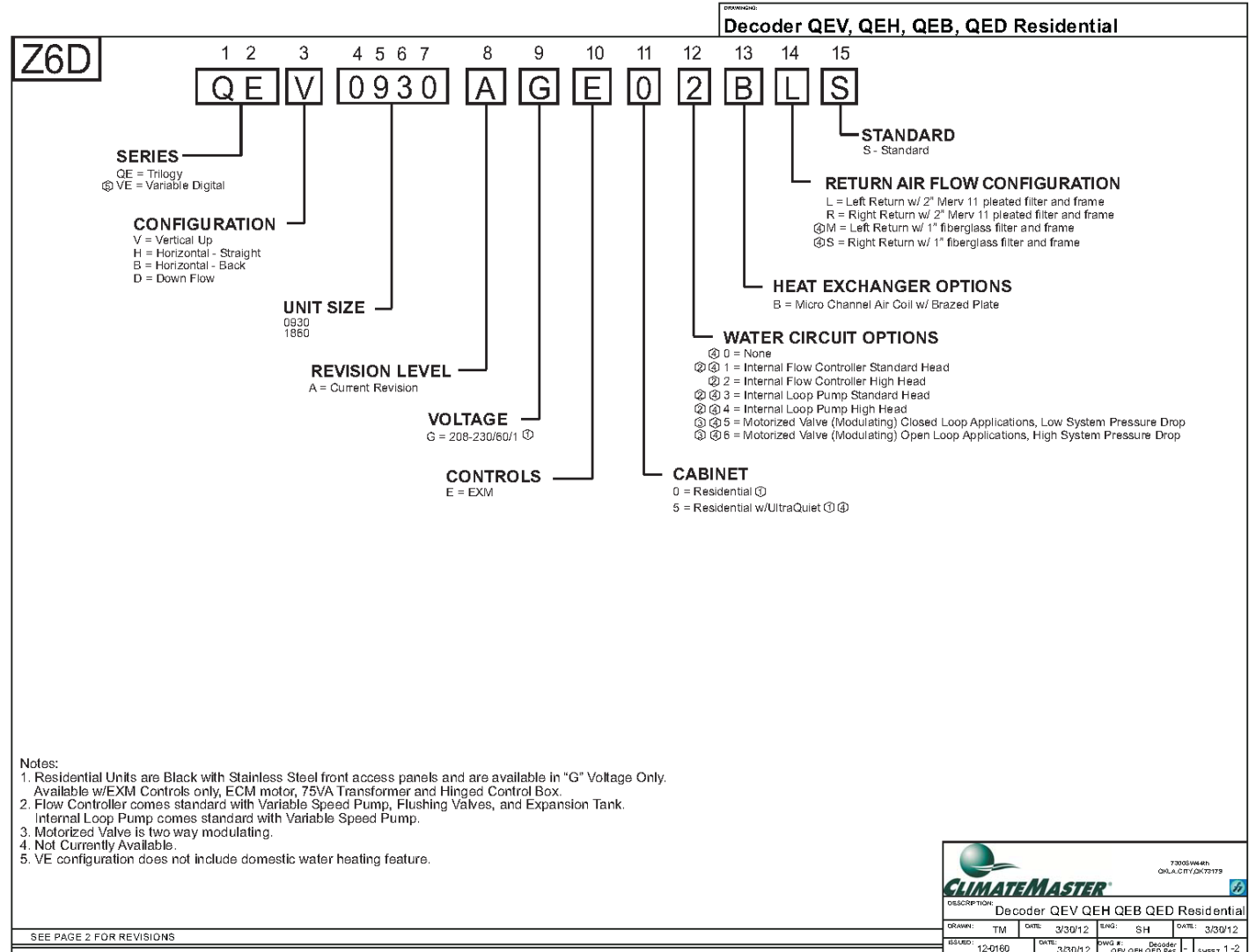
- Trilogy of Variable Speed Components
 - Variable Speed Inverter Compressor
 - Variable Speed Fan Motor
 - Variable Speed Water Pump
- vFlow[®] Internal Water Flow = up to 80% energy savings
- Internet Connected iGate[®] Communicating Controls
- Optional iGate[®] ClimaZone

VE Benefits

- Efficiency
- Comfort
- Convenience
- Quiet
- Reliable
- Appearance
- Diagnostics
- Warranty
- Broad Range Heating and Cooling Capacity
- Precise Temperature and Humidity Control



- Residential
 - Q3 2019
- Commercial
 - Q1 2020
- Pricing
 - TBD



New!! ClimateMaster Thermostats

CM100 THERMOSTAT

Controls Single or Dual Stage
Geothermal Heatpump Systems
Up to 3-heat & 2-cool

- Dual setpoint
- Large, easy to read display
- Thermoglow™ backlight
- Auto-changeover
- Locking keypad



CM500 THERMOSTAT

High Resolution, Touch Screen Display
Up to 4-Heat & 2-Cool Stages

- Gas electric or heat pump control
- Switchable programmable or non-programmable
- Adjustable timers & deadbands
- Set point limiting
- Equipped with humidity sensor: controls humidification & dehumidification
- Compatible with Wi-Fi sensor
- Programmable fan
- Accepts remote or outdoor sensor
- OpenADR 2.0b certified with Skyport*
- Customizable screensaver & customizable wallpaper
- Title 24 compliant
- Wi-Fi compatible with Skyport* Cloud Services & mobile applications



CM300 THERMOSTAT

Up to 3-Heat & 2-Cool Stages

- Gas electric or heat pump control
- Wi-Fi enabled
- 7-day programmable
- Dry contact equipped
- Local API
- Compatible with Skyport* Cloud Services & mobile applications
- Wireless sensor capable
- Title 24 compliant
- OpenADR 2.0b certified



CLIMATEMASTER CM100 THERMOSTAT

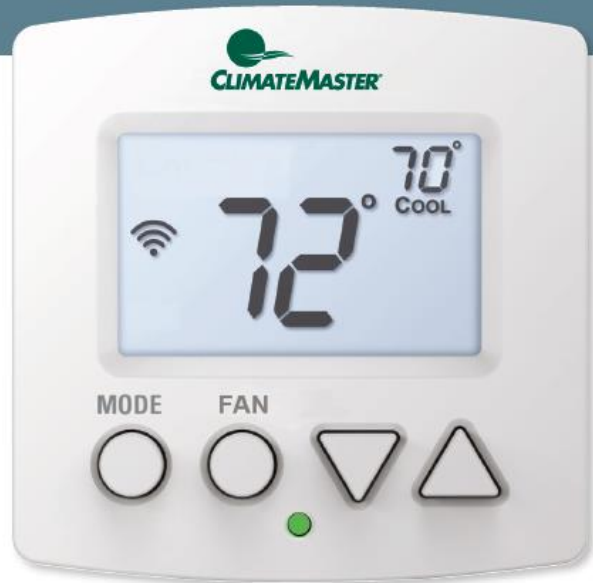


3.1" w x 3.1" h x 1.0" d

Features

- Designed exclusively for ClimateMaster heat pumps
- Dual setpoint and auto changeover
 - Simple to use
- Backlit display
 - Easy to read
- LED indicator indicating heating or cooling mode
- Controls within 1° of setpoint
 - Exceptional comfort control
- Capable of 3-stages of heat and 2-stage of cool
 - Saves energy
- Remembers setpoints & programming during power outage without battery
 - Set it and forget it
- Keypad lockout
 - Prevents unauthorized changes
- Works with 4 or 5 wires (no common necessary)
 - Easy installation
- Emergency heat
 - Ensures comfort and safety if repairs are required

CLIMATEMASTER CM300 THERMOSTAT



3.2" w x 3.2" h x 0.9" d

Features

- Designed exclusively for ClimateMaster heat pumps
- Wi-Fi built in
 - Remote access
- Gas/Electric or heat pump
 - Flexible for multiple applications
- 3 heat, 2 cool and humidification and dehumidification control
 - Energy efficient comfort
- 7-day programmable
 - Heating and cooling when you need it
- Dry contact input for Condensate overflow sensor
 - Prevents costly water damage
- Configured to communicate with ClimateMaster Skyport
 - Allows for remotely configuring and monitoring multiple thermostats
- OpenADR 2.0b certified
 - Can communicate with utilities when customers want to participate in demand response planning
- Capable of communicating with 3rd party software and Amazon Alexa
 - Will integrate with the technology of choice
- Option for wireless sensor
 - Sense temperature where it makes most sense

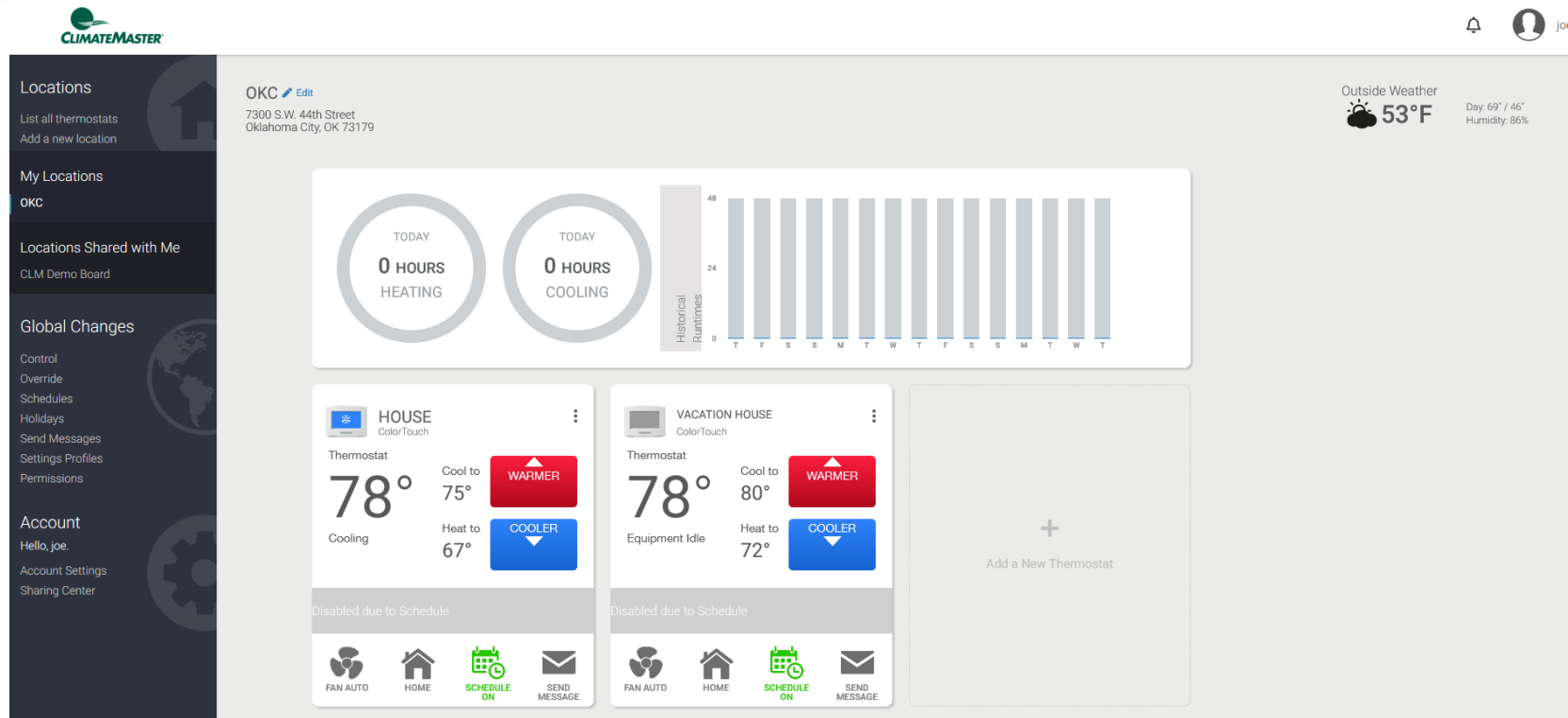
CLIMATEMASTER CM500 THERMOSTAT



5.25" w x 4" h x 1.1" d

All the features of the Wi-Fi thermostat plus:

- VGA color touch screen with several customizable background and screensaver themes available
 - Aesthetically pleasing and simple navigation and programming
- 4 heat, 2 cool and humidification and dehumidification control
 - Energy efficient comfort options to meet every need
- Set point limiting
- Programmable fan
 - User control of fan noise and recirculation
- Option for wireless remote sensor, outdoor sensor or duct sensor
 - Complete access to climate control information from the thermostat

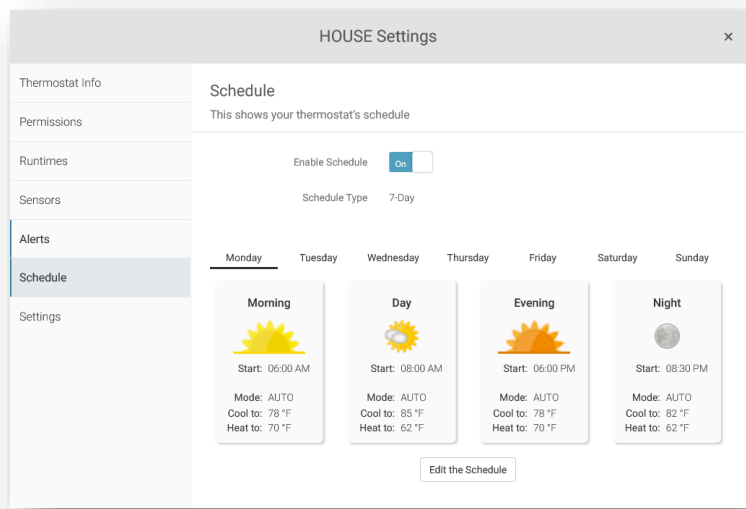


The screenshot shows the ClimateMaster Remote Access portal interface. On the left is a dark sidebar with navigation options: Locations, My Locations, Global Changes, Control, Account, and Account Settings. The main content area is light gray and displays the following information:

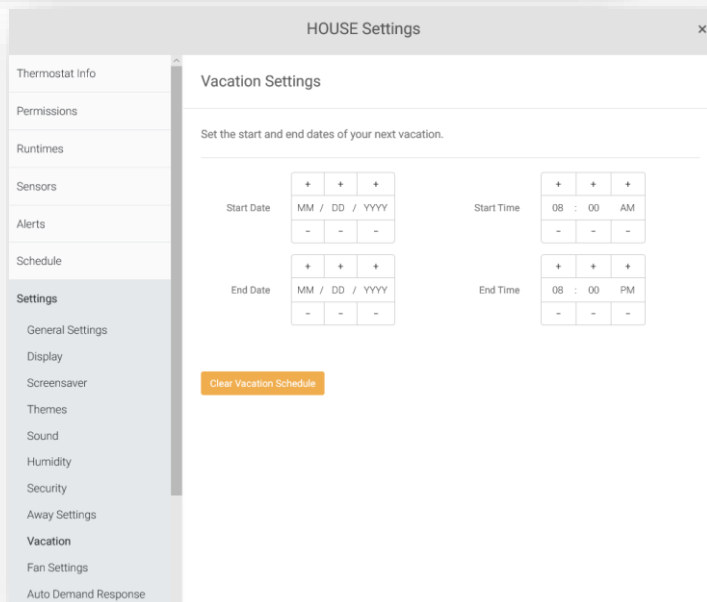
- Locations:** OKC (7300 S.W. 44th Street, Oklahoma City, OK 73179)
- Outside Weather:** 53°F, Day: 69° / 46°, Humidity: 86%
- Historical Runtimes:** A bar chart showing 24 hours of runtime data for heating and cooling.
- HOUSE Thermostat:** ColorTouch, Thermostat 78°, Cooling mode. Controls for WARMER (75°) and COOLER (67°). Status: Disabled due to Schedule.
- VACATION HOUSE Thermostat:** ColorTouch, Thermostat 78°, Equipment Idle mode. Controls for WARMER (80°) and COOLER (72°). Status: Disabled due to Schedule.
- Bottom Bar:** Icons for FAN AUTO, HOME, SCHEDULE ON, and SEND MESSAGE.

- Allows the user to monitor and control multiple thermostats from their computer or smart device
 - More convenient control of energy usage
- Monitor runtimes and status of remote sensors
 - Indicator of possible need for service
- Send messages for display on the thermostat

- Control thermostat from your Amazon Alexa device
 - Convenient setpoint changes
- Set alerts for Service, air filter change, UV lamp change, humidifier pad change, high/low temperature etc.
 - Drives service revenue
 - Ensures unit is running optimally



- Program or override daily schedule
 - Ensure the space is at the optimum temperature when schedules change
- Schedule vacations
 - One less thing to think about when leaving for vacation
- Make global changes to all thermostats at the same time
 - Simple changes to multiple thermostats at the same time



Full 7-day programmability available

- **Launch**
 - June 2019, first ship September 2019
- **Pricing**
 - Available in price book and business center – June 2019
- **Demo kits**
 - Part numbers and pricing available in price book and business center – June 2019
- **Literature**
 - Cut sheets currently available
- **Social Media – June 2019**
 - Facebook
 - Twitter
 - Enews
 - LinkedIn



Questions on New Products?

CLM Residential Business Development



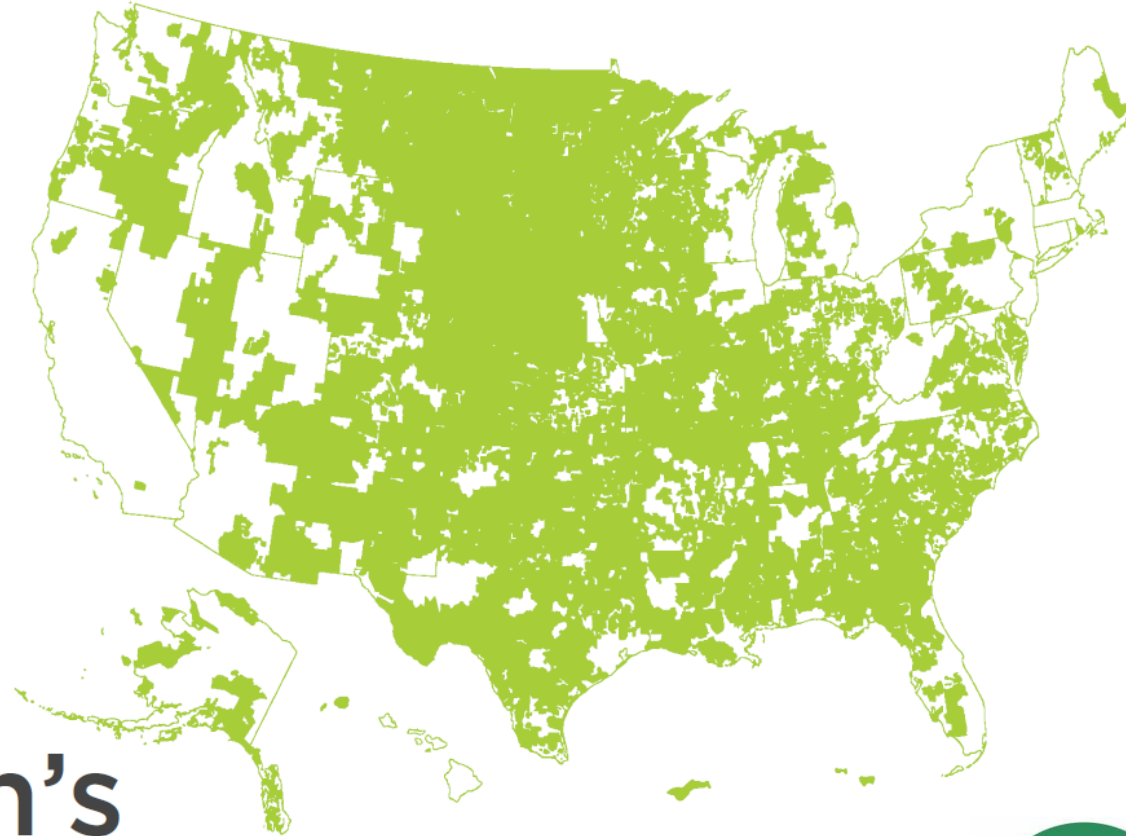
Titian Burris- Business Development
Manager/Regional Account Manager

833 distribution
and 62 generation
& transmission
cooperatives

Power

56%

**of the nation's
landmass.**



NRECA

America's Electric Cooperatives

ASSOCIATE MEMBER

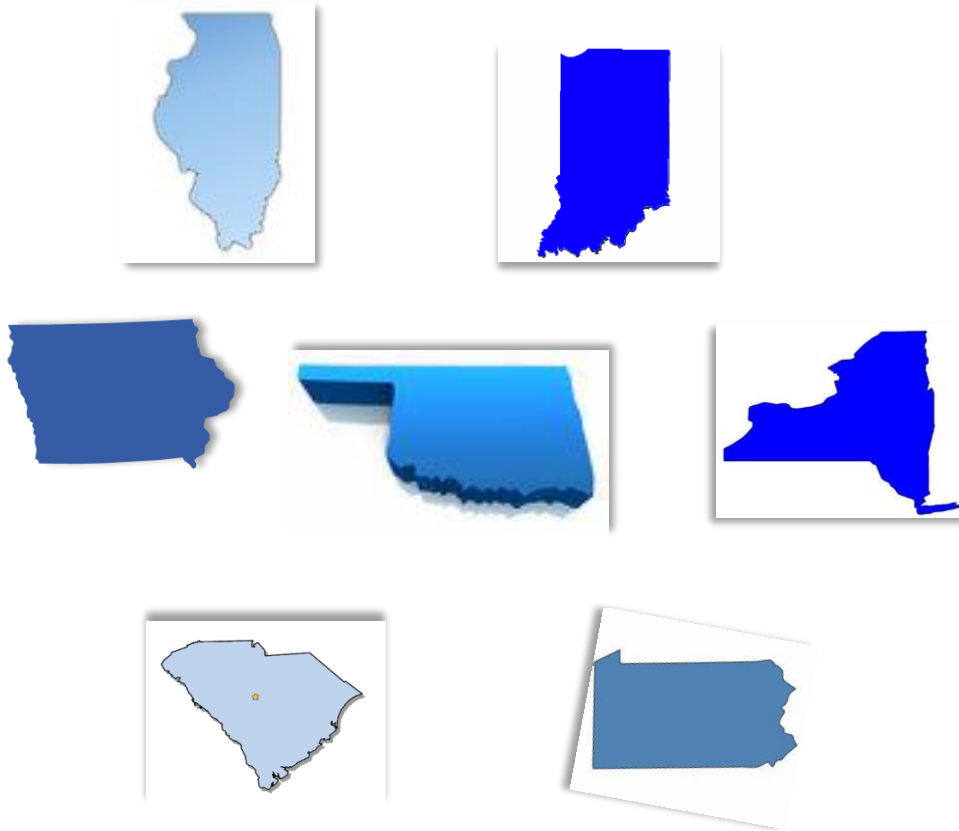
**Associate membership in NRECA does not signify an endorsement of products or services*

Strengths:

- ClimateMaster market leadership position
- Experienced track record of closing deals with REC, G&Ts, builders and developers

Opportunities:

- CM Support through experienced BDM
- Play Books Tailored to each participating REC
- NREC Networking
- NAHB Networking
- Demographics: Income, home value, heating fuel (Ex: Propane)
- Need to educate appraisers on the value of energy efficiency improvements
- Grassroot marketing - field days, county fairs, local marketing
- Customer Builders/Developers



Markets:

- Focus our key resources in markets with highest return
 - examples: OK, IL, IN, IA, SC, PA, NY
- Load Leveling- active Rural Electric Cooperatives
- Heavy REC residential load (meters) is key
- Aggressive REC- boards and management
- Markets with geo developable infrastructure, i.e. distribution, dealer, and driller network
- High propane/fuel oil use markets
- Custom new construction opportunities
- Markets that yield high ROI in comparison to conventional

Critical Success Factors (CSF)

Develop REC Play Book

Distribution to Establish
vetted dealer and driller
coverage within REC
markets

Partner with member RECs
to support geothermal (start
building relationships), set
up meetings and engage
BDM to support efforts

Distributor-
Builder/Developer Strategy
(start building relationships)
set up meetings and engage
BDM to support efforts

Marketing- lead generation



- **Leading the Pack Through Innovation**
- **CK Energy's Load Management Program Overview**
- **Boyd Lee- VP of Strategic Planning**

A LITTLE BACKGROUND

Thousands of new homes; debt going up; margins going down; rates going up. What the heck is going on?

Internal study on two housing additions, gas heat, gas hot water, etc.

Determined loss of approx \$112.00 per year per home.

Spending millions to buy the right to lose money on gas heated homes... forever!!

A LITTLE BACKGROUND



- Need to reduce peak demand and add off-peak kwh sales
- Internal study on two housing additions, gas heat, gas hot water, etc.
- Determined answer to be geothermal
- But how, they're expensive as heck!? Only the wealthy can afford them
- Builders hate putting them in
- Then, thanks to the Governor, an idea emerged...

01

“Promote the large-scale build out of residential

02

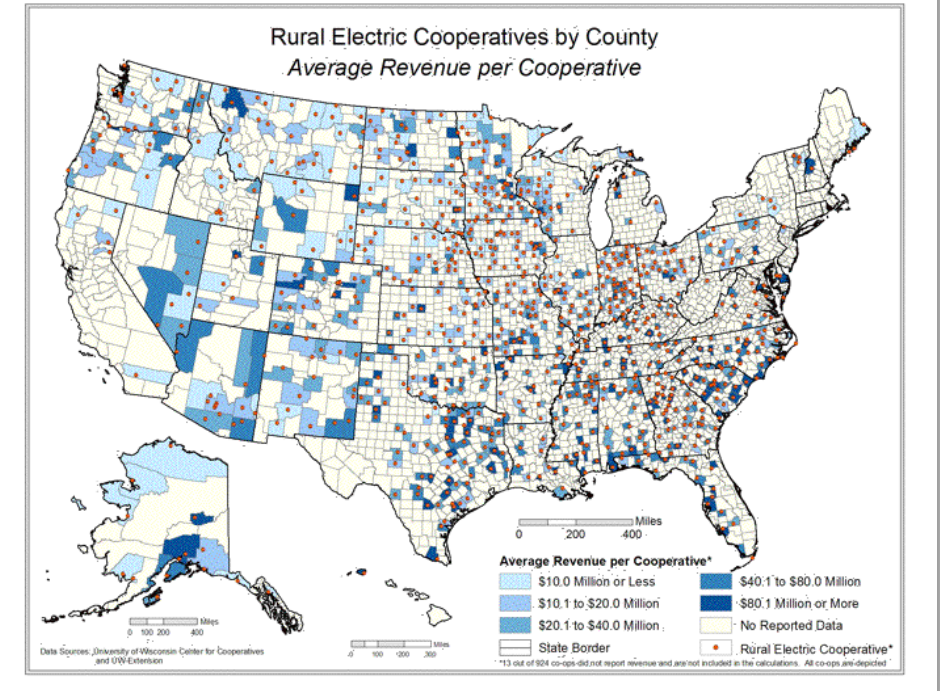
and commercial geothermal systems to preclude

03

the need for new power generation where practical”



- WFECC sponsored a study involving 22 Geo installations at 16 Member cooperatives in Oklahoma and New Mexico
- ClimateMaster was the participating Geo manufacturer in Oklahoma
- Coordination assistance from Air Products Supply and ClimateMaster involving many HVAC dealers and Loop drillers.



ONE 4-TON GEO UNIT

2.6 kW demand reduction on 4 Ton Geo (home or small business)

3,000-5,000 additional off-peak kwh sales when changing fuels or new construction

Revenue improvement leaves the utility room for added benefits

**Rebates
Loop Incentives**



WE KNOW THAT

Geo System = 40%-70% on heating, cooling and water heating costs over conventional system

Direct involvement on the part of the cooperative will drive pricing down sharply

Customer energy savings per 4 Ton unit ranges from \$1,100-\$2,000/yr

Average cost of installation...about \$6,000/ton!



IMPACT OF 1,000 GEO INSTALLATIONS

One Thousand new Geo Units Replacing Gas or standard HP and AC Systems Results In:

- 2,600 kW Demand Reduction = \$249,500/yr
- New kWh sales approx. 5,000,000 /yr = \$500,000/yr
- Net Annual Revenue Increase = \$750,000/yr



What is the DRIVER for the Utility?

Revenue Generation for the Utility to OWN the Ground Loop...

- COOP's, which are investor owned companies, realize
 - Additional Profits
 - Additional Revenues
- The amount of Revenue is estimated to be \$22.5M over a 30 year period
- The above is based upon a total of 1,000 homes with 4 tons units...and the results are simple and very REAL



Questions?



Sustainability Award



Thank You for Attending !!

Q & A – Day 2