

Retrofit Questionnaire

How many people live in the home? Adults _____ Children _____ Ages _____
Existing equipment age? _____ Years

- Any allergies or respiratory concerns? Yes No
 Home ever too humid or dry during different seasons? Yes No
 Any hot or cold spots in the home? Yes No
 Do you want a setback thermostat for savings or comfort? Yes No
 Concerned with duct work and home cleanliness? Yes No
 Aware of the importance of a well insulated, tightly built home? Yes No
 Any special needs of the home such as frequent large group entertaining or special equipment?

Describe below:

Any special safety considerations for children or pets? Yes No

Describe below:

- Special trees or shrubs that require extra care during our installation? Yes No
 Are you aware of the impact of loop installation upon your yard? Yes No
 Do you know anyone who has a geothermal system? Yes No
 Do either of you work for a utility company? Yes No
 What types of energy are available? Total Electric Natural Gas Propane Oil Wood
 What are you considering? Total Electric Natural Gas Propane Oil Wood
 How long have you been in this home? _____ Years

Typical savings accounts accrue at 5% per year before tax, what is an acceptable % return on your invested money? 5% 6% 7% 8% Other _____% Not Financing

If financing, what monthly payment can you afford?
 \$150 \$125 \$100 \$75 Other _____% Not Financing

Would you be interested in seeing the financing options available to you? Yes No

What are the 5 most important features to you?

- | | | |
|---|---|--|
| <input type="checkbox"/> low cost operation | <input type="checkbox"/> quality components | <input type="checkbox"/> comfortable room temperatures |
| <input type="checkbox"/> clean operation | <input type="checkbox"/> equipment appearance | <input type="checkbox"/> quiet operation |
| <input type="checkbox"/> odorless | <input type="checkbox"/> easy to service | <input type="checkbox"/> safety of your family |
| <input type="checkbox"/> no noisy outdoor equip. | <input type="checkbox"/> strong warranty | <input type="checkbox"/> reliability of equipment |
| <input type="checkbox"/> free hot water | <input type="checkbox"/> humidity control | <input type="checkbox"/> individual room comfort control |
| <input type="checkbox"/> environmentally friendly | <input type="checkbox"/> long equipment life | |

If you had to choose between price and quality which would you choose? Price Quality

Are there any other questions you need answered? Yes No

If yes describe below:

How many bids have you received to date? _____

How many more do you wish to receive? _____

Customer: _____ **Date:** _____