

THE TRANE TRUSTED COMFORT PLAN DEALER GUIDE



YEAR-ROUND COMFORT. UNSTOPPABLE PERFORMANCE.
CONVENIENT MONTHLY PAYMENTS.

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WHAT IS THE TRANE[®] TRUSTED COMFORT PLAN?

The Trane Trusted Comfort Plan is an all-inclusive, 5-year or 10-year purchasing option that exceeds what your customers expect from traditional financing promotions. In addition to year-round heating and cooling comfort, this plan offers the benefits of convenient monthly payments, the confidence of our industry leading warranties and worry-free maintenance and repairs.

As a dealer, the Trane Trusted Comfort Plan offers significant benefits to you, too. First, you earn the full retail price at the installation as well as recurring income from maintenance and repairs. Second, your team will be able to upsell higher-

end equipment and accessories by offering your customers a special monthly payment option with extended warranties and maintenance built into their price. Third, the plan has been built with two of our trusted partners: JB Warranties and Wells Fargo. Finally, it encourages long-term relationships with your customers by offering 5- or 10-year exclusive contracts for service and maintenance. The Trane Trusted Comfort Plan creates the ideal position for you to become your customer's trusted comfort consultant.

VALUE PROPOSITION FOR HOMEOWNERS

The Trane Trusted Comfort Plan is better than just financing – it’s a peace of mind protection plan, because you take care of everything for the customer.

The Trane Trusted Comfort Plan is an all-inclusive program that will transcend customer expectations of typical equipment-only financing. Designed with homeowners in mind, they benefit from a predictable, manageable low monthly payment as they invest in their brand-new HVAC system with a 5- or 10-year financing term. Homeowners will enjoy peace of mind as they protect their

investment with a matching 5- or 10-year parts and labor warranty with 1 or 2 annual service calls that include replacement filters all bundled into one monthly payment.

With the Trane Trusted Comfort Plan, homeowners can be confident that you will handle all the details to keep their system running at peak performance.

NEW TRUSTED TRANE EQUIPMENT



- ▶ Install America’s Most Trusted HVAC Brand for ten years running*
- ▶ Flexibility to choose the system and accessories that solve for your comfort concerns
- ▶ A whole home solution with industry leading innovation and unrivaled reliability

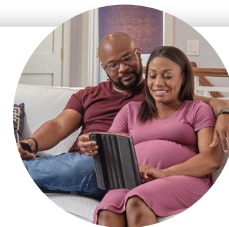
CONVENIENT MONTHLY PAYMENTS



- ▶ Choose between 5- or 10-year financing
- ▶ No down payment required to start plans
- ▶ Monthly payment can be offset by lower utility bills when upgrading to a high-efficiency system
- ▶ Qualified equipment may earn additional eligible credits and rebates

PEACE OF MIND

- ▶ 1 or 2 annual Maintenance visits including filter changes at each visit
- ▶ No cost of unexpected repairs or out of pocket expenses
- ▶ Worry-free comfort in your home for years to come



*Trane, an HVAC industry leader and innovator, has been named the top residential HVAC brand for the 10th time in a row. The designation comes from the 2024 Lifestory Research Most Trusted®

VALUE PROPOSITION FOR DEALERS

All-inclusive plans with monthly payments have become a consumer expectation. The Trane Trusted Comfort Plan encourages this convenience and delivers just that – one manageable monthly payment for your customers’ heating and cooling concerns. As a result, the program positions your dealership to offer a wide range of options to suit your homeowners specific needs, whether they require entry-level or

high-efficiency equipment, the Trane Trusted Comfort Program provides solutions to help align with your customer’s budget. It also enables you to up-sell additional accessories, drive recurring revenue from maintenance plans, and while simplifying back-end management of one-off recurring service plans. Best of all, in the process you’ll be creating “customers for life” that can lead to future sales and referrals.

FAST FUNDING PROCESS

- ▶ Receive full retail price at time of funding less any fees associated with the finance promotion – no additional claim backs or restrictions
- ▶ Funds deposited within 12-24 business hours

DEVELOP LONG-TERM RELATIONSHIPS WITH CUSTOMERS

- ▶ Exclusive service and maintenance over the course of the financing term
- ▶ Position yourself as the trusted comfort consultant

EARN RECURRING REVENUE

- ▶ Choose your service reimbursement rate: \$150/hr, \$200/hr, \$300/hr
- ▶ Filter allowance of \$50 on every service call

LEVERAGE OPERATIONAL EFFICIENCIES

- ▶ Build in maintenance visits to your operating schedule and keep technicians busy during the off-season
- ▶ Free up back office from additional billing and collections for service agreements

5- OR 10-YEAR FINANCING OPTIONS ENCOURAGE UPSELLING

- ▶ Average ticket price over \$13,000
- ▶ Drives close rate for higher-end systems and additional accessories

HOMEOWNER OPTIONS AT END OF TERM

Life can be unpredictable, and that's why the Trusted Comfort Plan has been designed with flexibility in mind. Whether a customer wants to sell their home or pay off the balance of the contract before the term is up, the transaction is simple and transparent—giving them peace of mind for the duration of the contract.

ELIGIBLE PRODUCTS

Any Trane or RunTru system and accessories are eligible for the Trane Trusted Comfort Plan.

Certain finance promotions may require a minimum purchase amount. See the financing rate sheet for promotion details.

TRANE AND RUNTRU SYSTEMS



HOW TO OFFER THE TRANE TRUSTED COMFORT PLAN TO HOMEOWNERS

The Trane Trusted Comfort Plan is currently offered in partnership with Wells Fargo and JB Warranties.

WELLS FARGO CONSUMER FINANCING

Wells Fargo Trane merchants currently enrolled in the program are eligible to bundle the Trusted Comfort Plans with any finance promotion available on the promotional rate sheet. Trane Comfort Specialist (TCS) dealers who have selected the Wells Fargo Buy-Down Growth Benefit will still receive their designated rates for all plans sold in this program.

To enroll in the Wells Fargo program, complete the online dealer application in ComfortSite (Financial > Consumer Financing > Enroll Now). The application requires several details about your business as well as the Owner's acknowledgment and digital signature. Once the application is submitted, underwriting and approval may take up to 2-3 weeks.

JB WARRANTIES

Dealers who are currently signed up to sell JB Warranties plans must visit trane.jbwarranties.com and click on the "Contact Us" button to request Trusted Comfort Plans to be visible in their JB Warranties account. TCS dealers under the JB Warranties bubble who have selected the JB Warranties Growth Benefit may accrue plans sold in this program towards their Elite dealer credit.

If you do not currently offer JB Warranties programs today, visit trane.jbwarranties.com to learn more about their program and click on "Register" to become an enrolled dealer.

HOW TO OFFER THE PLAN

1 PRESENT YOUR SALES QUOTE TO THE CUSTOMER

Include the Trane Trusted Comfort Plan that suits their needs as well as the monthly payment option in the quote.

2 OFFER THE DIGITAL CUSTOMER CREDIT APPLICATION

Encourage your customer to apply for financing by offering the digital customer credit application via your Wells Fargo At-Home Link, on Credit Connect, by sending an email application through Remote Applications, or by using a Wells Fargo Scan To Apply application code.

3 COMPLETE THE WELLS FARGO AUTHORIZATION

If your customer is approved, proceed with an authorization and have them complete the digital finance invoice either on Credit Connect or by emailing it via Remote Transactions on the Wells Fargo Online Resource Center. The authorization will hold the funds on the customer's account until the installation is complete.

4 PURCHASE THE JB WARRANTIES PLAN

5 COMPLETE THE INSTALLATION

6 CHARGE THE CUSTOMER'S WELLS FARGO ACCOUNT

7 REGISTER THE TRANE OR RUNTRU EQUIPMENT FOR FACTORY WARRANTY

8 CREATE A SCHEDULE FOR THE MAINTENANCE PLAN VISITS

9 PROCESS AND FILE CLAIMS FOR MAINTENANCE VISITS AND FAILURES WITH JB WARRANTY

JB WARRANTIES EXTENDED MAINTENANCE PLAN

The JB Warranties Extended Maintenance Plans included with the Trane Trusted Comfort Plan contain similar items to a standard maintenance offering that you may be familiar with today. Reimbursement rates are available for \$150, \$200, or \$300 per hour for the life of the plan (5- or 10-years). You will receive the same hourly reimbursement rate for the life of the plan. This helps keep the homeowner's costs predictable when they are considering the purchase of their new system.

- ▶ Dealer will perform maintenance 1- or 2-times per year in accordance with the maintenance plan selected
- ▶ Dealer will be paid by JB Warranties after each maintenance visit
- ▶ Dealer is responsible for tracking and scheduling service for each homeowner that purchases a Trane Trusted Comfort Plan
- ▶ Filters are included in the cost of the plan to the homeowner. Dealer will receive a \$50 filter allowance for each visit

YEAR-ROUND COMFORT. UNSTOPPABLE PERFORMANCE. **LOW MONTHLY PAYMENTS.**

FOR MORE INFORMATION

Reach out to your Account Manager for more information about the program
or go to [ComfortSite](#) > [Financial](#) > [Trane Trusted Comfort Plan](#)

WELLS FARGO MERCHANT SUPPORT

- 📞 Merchant Support: +1 855-551-5111
- ✉️ TraneASAsupport@wellsfargo.com

JB WARRANTIES SUPPORT

- 📞 Dealer Support: +1 800-742-5522
- 💬 Chat on JB Warranties Website: <https://trane.jbwarranties.com>

WE ARE COMMITTED TO USING ENVIRONMENTALLY FRIENDLY PRINTING PRACTICES.



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About Trane

Trane – by Trane Technologies (NYSE: TT), a global climate innovator – creates comfortable, energy-efficient indoor environments for commercial and residential applications. For more information, visit Trane.com or TraneTechnologies.com

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