A SIMPLE, 3-STEP CHECKLIST TO HELP GUIDE YOU THROUGH THE PURCHASING PROCESS

How does one navigate the newest trends in heating and cooling systems and make the right choice? Print these pages out, and use them to guide your discussion with your potential HVAC dealer.
#1 My Priorities

A PERSONAL ASSESSMENT OF MY CURRENT SYSTEM AND NEEDS

Plan ahead so you can avoid being forced into making an emergency decision during extreme weather conditions. The following checklist will not only help you narrow down your choices, but can also prompt your dealer to show you how to maximize savings and performance on your heating and cooling system.

☑ My Personal Comfort

- I’ve noticed that some rooms in my home are hotter or colder than others.
- I currently have separate thermostats or zones.
- I’d like the ability to control different areas in my home, assigning different settings to each.
- I’ve recently added on to my existing home.
- I may add on rooms in the future.

☑ My Indoor Air Quality

- I have pets.
- Members of my household suffer from allergies.
- I’m concerned about high levels of pollen, dust, or mold.
- I have a small child.
- My current system seems noisy.
- I’d like to be able to control the humidity in my home.
- I’d like to be able to control the temperature in my home while I’m away.

What Does Comfort Mean to Me?

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#1 My Priorities (cont.)

A PERSONAL ASSESSMENT OF MY CURRENT SYSTEM AND NEEDS

✓ My Financial Investment

Several factors can affect your budget... both at the time of your purchase and in the years to come.

RATING – It might make sense to invest a little more up front, so you’ll have greater savings in the long run.

Each system bears a universal rating regarding energy efficiency, fuel utilization, and seasonal performance. A higher rating means greater efficiency which can lower your utility bills.

Take a look at your current system, and make a note of the following ratings so you can compare it with newer models:

☐ SEER (Seasonal Energy Efficiency Ratio)
   Your current system’s SEER rating: ________

☐ AFUE (Annual Fuel Utilization Efficiency)
   Your current system’s AFUE rating: ________

☐ HSPF (Heating Seasonal Performance Factor)
   Your current system’s HSPF rating: ________

TIMING – Special Seasonal Rebates could impact your actual purchase price.

If possible, you may want to time your purchase in order to take advantage of seasonal rebates.

TAX CREDITS & UTILITY REBATES – When you purchase certain systems you may be eligible for Tax Credits or Rebates from your local utility company.

Knowing that you’ll be getting money back (on the federal, state, and local level) could influence your decision as to which system you can afford.

FINANCING OPTIONS – You may be able to afford a higher end system with Financing.

Special financing options available on many systems may allow you to purchase a high efficiency system, so you can realize greater savings down the road.
WHAT’S OUT THERE

Most likely, a lot has happened in the HVAC industry since the last time you invested in a heating or cooling system. Here’s a quick overview:

☐ Variable-Speed, Two-Speed, Single-Speed

Used to be, systems were only single-speed – which meant they were either on or off. Now, variable-speed and two-speed systems can automatically “shift gears” (much like a car) and adjust their settings to accommodate various environments. For example, if the system senses that it would be more efficient to run on a lower setting for a longer period of time, it will…and the airflow in your home will be more constant. That results in more even, more comfortable temperatures, and greater **Energy Efficiency**.

☐ Ductless Systems

Ductless systems are just that – they’re mounted on a wall and require no ductwork to operate. They’re ideal if you’ve added on a room, or would like to heat or cool a garage…or man cave. **Ductless Systems** are extremely efficient, because they use less power and deliver the air directly to a particular area or zone. Because there are no ducts that can collect dust, bacteria, pollen and allergens, they can provide cleaner air. Also, they have a smaller carbon footprint.

☐ Smart Technology and Home Automation

**Intuitive Mobile Apps** allow you to monitor and control components of your home from virtually anywhere...everything from heating and cooling, to lights, and even security systems. For example, have you ever left for vacation and forgotten to set your alarm system? Or, on an unusually warm fall day, wouldn’t it be convenient to adjust your home’s furnace while you’re at work? Or, if you’ll be home later than planned, the ability to remotely turn lights on can help to provide added safety as well as peace of mind.
#2 My Options (cont.)

**WHAT’S OUT THERE**

- **Indoor Air Quality (IAQ)**
  
  If you have pets, small children, or if you struggle with allergies, [Indoor Air Quality Systems](#) can help to ensure that the air in your home is as clean as possible and healthy to breathe. Humidifiers, ventilators, ultraviolet lamps, air filters and monitors can all work together to help make your entire household more comfortable.

- **High-Efficiency Systems**

  Installing a high-efficiency system can result in lower utility bills and quieter operation. And a high-efficiency system may make you eligible for significant tax credits and utility rebates. Systems include [Air Conditioners](#), [Heat Pumps](#), [Gas Furnaces](#), [Fan Coils](#), and/or [Packaged Products](#).

- **Zoning Systems**

  It’s possible to control the air in particular areas in your home depending on where you spend the most time or which areas tend to be naturally warmer or cooler than others. For example, you may want different settings for sleeping areas vs living rooms; or sunny rooms vs shaded ones.

- **HYBRID HEAT® Dual Fuel System**

  [HYBRID HEAT](#) dual fuel systems consist of a heat pump for electricity-fueled heating and cooling, a gas furnace, an evaporator coil and a control. The system automatically selects the most economical fuel source – gas or electric – based on data through the control to heat the home with maximum efficiency. Because the system provides the flexibility to work with multiple fuel sources, it provides additional protection from unpredictable fuel cost increases.

- **Geothermal Systems**

  [Geothermal Systems](#) use thermal energy found underground, or in a pond or large body of water. Geothermal heat pumps are able to maintain very high efficiencies in both winter and summer... and because they’re installed indoors, their lifespan is longer than an ordinary outdoor HVAC unit.
#3 My Best Solution

**HOW DOES CARRIER STACK UP AGAINST THE COMPETITION?**

You’re about to make a significant investment in your home, your family’s comfort, and their well-being. So it’s important to consider the reputation of the brand you’ll purchase. Here are some quick facts about why you’d want to work with a Carrier® dealer.

**The Carrier Difference**

Carrier is the world’s leader in high technology heating and cooling solutions. From leading edge research and product development, to requiring 100% of our products to be run-tested before they leave the factory, we are committed to providing our customers with the highest quality products – from high end systems to value products. Our Factory Authorized Dealers are carefully selected, and have gone through rigorous training to ensure that you’re getting the best possible quality in terms of products, installation, and service.

**Carrier History**

In 1902, Willis Carrier invented modern air conditioning. He launched the entire industry and has become known as “The Father of Air Conditioning.” The Carrier brand is now synonymous with leading edge technology and product reliability. Product innovations like the Carrier® Infinity System and the Carrier Performance™ Series Multi-zone Ductless System continue Willis Carrier’s legacy. We’re always on the forefront, ensuring that every Carrier customer can take advantage of current technology, no matter what the size of the project or budget.

**Carrier Financing**

Through the Carrier Retail Financing Program, participating Carrier dealers offer several flexible options for financing your new Carrier® system. With approved credit from Wells Fargo Financial National Bank, you’ll enjoy convenient monthly payments, flexible financing terms, and easy online account management.

**100% Satisfaction Guarantee**

Carrier® Factory Authorized Dealers have met Carrier’s strict standards for the quality of their products, expertise and service, and their performance is backed by Carrier’s 100% Satisfaction Guarantee. 100% Satisfaction. Guaranteed. That’s how confident you can be your decision to choose a Carrier Factory Authorized Dealer.

**QUESTIONS TO ASK YOUR DEALER:**

- How long have you been in business?
- Are you licensed, bonded, and insured?
- Are you a Factory Authorized Dealer? And if so, what does that mean for me?
- Do you offer guarantees on your product as well as on the installation?
- Can you help me with rebates and tax credit information?
- Will I need to call each season to schedule maintenance, or will you automatically reach out to me?
- Can you provide me with references?