



# 2009/2010 Tax Credit

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## Trane Energy Tax Credit Summary

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### The 2009-2010 Energy Tax Credit and You

With the passage of President Obama's Economic Stimulus Bill, homeowners may be eligible for a tax credit if they purchase certain types of heating, ventilation and air conditioning (HVAC) systems, water heating equipment, or make other energy-related improvements to their homes between January 1, 2009 and December 31, 2010.

As a leader in enabling homeowners to take control of their own energy management, Trane already offers systems that may help you save up to 60 percent on your energy bill.<sup>1</sup> To add to that savings, Trane offers many products that are eligible under this new energy tax credit law. Depending on the type of system or product purchased, it is possible to qualify for a tax credit of up to \$1,500 on your 2009 or 2010 income tax return. Read on to learn how the government's new tax credit program works, which Trane products qualify, and how to apply for a tax credit.

#### How did the tax credit come about?

On February 17, 2009, President Obama signed the American Recovery and Reinvestment Act (also known as the Economic Stimulus Bill) into law. This legislation combines spending and tax incentives designed to get the American economy moving again by investing in our nation's roads and energy infrastructure, and by providing incentives for increasing the efficiency and performance of America's homes and commercial buildings.

#### Which products are eligible?

Some — but not all — of Trane's products may qualify for the tax credit. [Click here](#) to find a listing of the specific products that qualify, as well as print of your tax certification. In addition, you'll find the government's summary of Energy Star products that are eligible for HVAC credits. As always, you can also contact your local independent [Trane dealer](#) who can help you determine product model numbers if necessary.

#### How do I apply for a tax credit?

For qualified improvements, homeowners may be able to claim tax credits equal to 30 percent of the installed costs (up to \$1,500). The new tax credits are retroactive to January 1, 2009 and expire on December 31, 2010. The \$1,500 limit is for all improvements made during the two-year term, rather than \$1,500 each year.

The tax credit applies as a direct reduction of taxes owed. In the past, IRS has directed taxpayers to use Form 5695 (the Residential Energy Efficient Property Credit). It is expected that the IRS will produce new rules related to the recently enacted stimulus legislation, giving taxpayers further guidance on claiming tax credits. To fully understand how the new tax credit may apply to you and what you can do to obtain one, you should consult with a tax professional for advice on tax preparation, as this tax credit is subject to IRS regulations.

#### How do I learn more about Trane's energy efficient products?

Trane is committed to providing your family with a system that is tailored to your specific needs. Find out more information about Trane [matched systems](#) that are designed to give you the best performance for your heating and cooling dollars. In addition, you can also talk with your local independent [Trane dealer](#).


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## Additional Information About the 2009 Energy Tax Credits and Trane

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Some – but not all – of Trane's products may qualify for the tax credit. We have included a summary of the bill as it applies to residential HVAC equipment.



- Split system air conditioning efficiency requirements – 10 SEER/13 EER (both efficiency levels must be met to qualify for the tax credit).
- Split system heat pump efficiency requirements – 15 SEER/12.5 EER/8.5 HSPF (all three efficiency levels must be met to qualify for the tax credit).
- Gas furnace qualifying levels – 80% AFUE
- Packaged A/C, HP, or dual fuel products – 14 SEER, 12 EER, 8 HSPF
- Maximum tax credit amount - \$1500. The legislation specifies 30% of the cost of qualifying equipment, including installation costs, subject to a \$1500 maximum per homeowner.
- The tax credit is effective for all qualified systems installed from 1/1/2009 through 12/31/2010.
- The tax credit is only valid for taxpayers that own their home and if it is used as the principal residence.


[Find out more information](#) regarding the government's summary of Energy Star products that are eligible for HVAC credits.

[Identify your product and Download the Certificate here](#)

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The IRS is responsible for the implementation of the tax incentive portions of the legislation, so details of how

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### Federal Tax Credits for Energy Efficiency

UPDATED March 5, 2009

Federal Tax Credits for Energy Efficiency includes:

- [Tax Credits for Consumers](#)
  - Tax credits are available at 30% of the cost, up to \$1,500, in 2009 & 2010 (for existing homes only) for:
    - [Windows and Doors](#)
    - [Insulation](#)
    - [Roofs \(Metal and Asphalt\)](#)
    - [HVAC](#)
    - [Water Heaters \(non-solar\)](#)
    - [Biomass Stoves](#)
  - Tax credits are available at 30% of the cost, with no upper limit through 2016 (for existing homes & new construction) for:
    - [Geothermal Heat Pumps](#)
    - [Solar Panels](#)
    - [Solar Water Heaters](#)
    - [Small Wind Energy Systems](#)
    - [Fuel Cells](#)
- [Cars](#)

**Frequently Asked Questions:**

- [How has the new Stimulus bill affected the tax credits for energy efficient home improvements?](#)
- [What tax credits are available in 2009 for energy efficient home improvements?](#)
- [Are installation costs covered by the tax credit?](#)
- [All Tax Credit FAQs](#)

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The IRS is releasing this tax credit applicable to home owners with your dea

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### Am I Eligible?

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In order to determine if you qualify for this tax credit, you will need the model numbers of your equipment. These numbers will include your outdoor unit, air handler or furnace and coil, depending on your application. Should you need assistance in obtaining your model numbers, please contact your [local independent Trane dealer](#) for assistance.

What is the model number of your heat pump or air conditioner?

2TVW403GB1

What is the model of your furnace or air handler?

ZTEE3F35A1

We are pleased to inform you that the product or system you've chosen is eligible for an energy tax credit under the American Recovery and Reinvestment Act, if installed between January 1, 2009 and December 31, 2010. For qualified improvements, homeowners may be able to claim tax credits equal to 30 percent of the installed costs (up to \$1,500). The \$1,500 limit is for all improvements made during the two-year term, rather than \$1,500 each year. The credit amount you may receive is subject to IRS regulations. Please consult a tax professional for advice on tax preparation.

[Click here to view the Trane Certification Statement for this product combination.](#)

Based on your answers, you could be eligible for an energy efficiency tax credit under the American Recovery and Reinvestment Act of 2009. A taxpayer claiming credit for Qualified Energy Property should retain a copy of the Trane certification as part of the taxpayer's records, along with the receipt from purchase. Taxpayers should consult with a tax advisor to determine what qualifies for a tax credit or refer to the rules of the Internal Revenue Code. The IRS will determine final tax credit amounts.

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## Manufacturer's Tax Credit Certificate American Recovery and Revitalization Act of 2009

The American Recovery and Revitalization Act of 2009 (ARRA) provides tax credits for the installation of Qualified Energy Property for residential heating and cooling equipment. Trane U.S. Inc. (Trane) certifies that the products or system listed below and placed in service from January 1, 2009 through December 31, 2010 meets the efficiency requirements according to AHRI's rating system be eligible for a tax credit under ARRA.

**Manufacturer:** Trane U.S. Inc., 6200 Troup Highway, Tyler, TX 75707

**Class of Qualified Energy Property:** Residential heating and cooling equipment, including: central air conditioners, air source heat pumps, gas furnaces, oil furnaces, propane furnaces, and gas/oil/propane furnaces with advanced circulating fans

### Other Important Homeowner Information

There are other important requirements and limitations for the tax credits under ARRA such as the qualified energy property must be installed in the homeowner's primary residence. Trane recommends that homeowners consult a tax professional to ensure they meet all requirements. The Internal Revenue Service is responsible for implementing and administering the tax credits made under ARRA.

Under penalty of perjury, I declare that I have examined this certification statement, and to the best of my knowledge and belief, the facts presented are true, correct, and complete.

Gordon Wuthrich  
Vice President, Marketing  
Trane Residential Systems

**Qualifying Product or System**



***TRANE***<sup>®</sup>

