

Promotional Financing

Sales and Marketing Programs Operating Letter

United States Exclusive



Effective January 1, 2024 to December 31, 2024
PUBL-6609-YK-202401-A
www.york.com/dealers



Promotional Financing

Eligible Levels: Liberties Plus and Certified Comfort Expert

Providing homeowners with financing options is more important than ever. The reality is if a contractor is not offering financing, their homeowner may not follow through on their HVAC purchase. In fact, 41% of home improvement cardholders say they wouldn't have made the purchase, or would've gone to another business if financing was not available.*

Homeowners want payment options.

- 62% of Synchrony cardholders feel promotional financing makes their large purchases more affordable.*
- Cardholders spent \$4,383 more, on average, 155% more compared to non-cardholders.*
- 75% of Synchrony contractors report financing increases their average sale.**
- 41% OF Synchrony cardholders say they would walk away from the purchase if retailer financing was not offered.*

*Synchrony Ninth Major Purchase Study, Home Improvement 2023
**Synchrony Dealer Survey, Home Improvement 2023

Incentive Schedule

This program offers Full-Year Promotional Financing for Certified Comfort Experts and nine months for Liberties Plus contractors (January through May, and September through December).

The year will consist of three different promotion periods:

- Spring promotion: January 1, 2024 to May 31, 2024
- Summer promotion for CCEs: June 1, 2024 to August 31, 2024
- Fall promotion: September 1, 2024 to December 31, 2024

	CCE	Liberties Plus		CCE	Liberties Plus
January	Yes	Yes	July	Yes	No
February	Yes	Yes	August	Yes	No
March	Yes	Yes	September	Yes	Yes
April	Yes	Yes	October	Yes	Yes
May	Yes	Yes	November	Yes	Yes
June	Yes	No	December	Yes	Yes

We will announce each promotion 60 days prior to their start so that contractors may prepare in advance. Buydowns are offered on 30+ consumer promotions available through our program with Synchrony. This phenomenal program benefit enables our network to offer attractive financing options to the homeowner at a significantly reduced contractor cost when selling YORK equipment with financing in 2024. The special buydowns are available on the following products per the qualified equipment incentive matrix below.

Type	Model Numbers			Max Finance Value
Air Conditioners and Heat Pumps				
21 SEER	YXV / YZV	19 SEER2	YXV / YZV	\$21,550
19 SEER	YXT / YZT	18 SEER2	YXT / YZT	\$14,375
17 SEER	YFK / YCG	16 SEER2	HMCG2/ HMM7	\$10,000
16 SEER	YHM / YHG	15.2 SEER2	YC2F / YH2F	\$10,000
14 SEER	YFE / TCHE / THE / YHE / YCE / YCS	14.3 SEER2	YC2E / YH2E	\$8,625
13 SEER	YFD / TCD / YCD / TCHD /	13.4 SEER2	YC2D	\$8,625
Furnaces				
Premium	YP9C / YPLC / Y9VV*			\$11,500
Enhanced/ Standard	TL9E / TM9E / TM8Y / TM9Y / TM8E / TL8E / TM8V / TM9V / Y82E / Y81E / Y82E / Y91E* / Y92E* / Y82V* / Y92V*			\$8,625
Air Handlers				
Premium	AVC / AVV / MV / MVC / JHVV / JHVT / JMVT			\$7,200
Standard	AE / AP / ME / MP / JHET / JMET			\$7,200
Packaged Units				
Premium	PCG6 / PCE6 / PHE6 / PHG6			\$21,550
Standard	PCG4 / PCE4 / PHE4 / PHG4			\$14,375
Ductless Mini-splits and Mini- VRF				
Premium	DHS / DHX / DHZ / DHW / RAS-SH/ RAC-SH / RAS-PH / RAC-PH			\$21,550
Standard	DHP / DHR / DHM / RAS-EH / RAC-EH / RAM-S / RAS-EH / RAS-SH / RAI-SH / RAF-SH / RAD-SH / RAS-1.0-4.0 / RPK/ RCIM / RCI / RPIL / RPIM / RPK			\$17,250
Mini-VRF	HVAHP			\$21,550

*Available throughout calendar year 2024

If more than one product is included in the financed job, the sum of the eligible maximum finance values is the amount which will be utilized to calculate the rebate amount. Only one claim per financed sale is accepted by the claims system, thus contractors must include all eligible equipment models per financed sale in each claim they submit via SolutionNavigator.com.

For a list of the plans and current promotional rates refer to the financing promotion flyers on Marketing Library applicable to each promotional period.

Program Terms and Conditions

Contractor Eligibility

- To activate the program, contractors must be registered as a Liberties Plus or Certified Comfort Expert contractor in the Marketing Dashboard. The “Residential Financing” and “Promotional Financing” programs must be selected in the contractor’s enrollment at time of installation.
- Participating contractors must have an aligned Liberties number tied to their Merchant account at Synchrony.
- Contractors must be enrolled with Synchrony on a JCI program Merchant Number and process the consumer application and submit for funding under their JCI program Merchant Number to take advantage of promotional financing offers.
- Contractors must be in good standing with Synchrony following the end of the calendar month in which the contractor fee rebate was earned and have an open Merchant Number to receive rebate payments.

Eligible Equipment

- Qualified equipment consists of all Ducted and Ductless systems branded residential equipment (excluding Guardian, Manufactured Housing, and Evcon products). See above table for additional information.
- Manufactured housing and new construction installations do not qualify for promotional rebates. Three-phase equipment is excluded from this promotion. Promotional offers will not be extended for products not in stock.

Distributor Requirements

- No distributor contribution is required. Our financing promotions are brought to you by Johnson Controls in partnership with Synchrony.

Claims, Fees, and Incentive Payouts

- Incentives are paid in United States currency (USD).
- Financed sales must be funded with Synchrony within the promotion dates to be eligible for rebates.
- Contractors must submit claims for rebates with correct information via SolutionNavigator.com within 30 calendar days of funding.
- Contractor fee rebates are paid directly to the contractor by Synchrony via ACH within 48-72 hours of claim approval.
- Only one claim per financed sale is accepted by the claims system, thus contractors must include all eligible equipment models per financed sale in each claim they submit via SolutionNavigator.com.
- Claims submitted with incorrect Invoice Number, Serial Numbers, Synchrony Merchant Number or Synchrony Cardholder Account Number will not be approved by the automated claims system.
- Best practice is for contractors to have the above information available for claims entry. If contractors do not have the full Synchrony cardholder account number when entering a claim, please share these steps:
 - In Synchrony Business Center as an Admin, go to Sales Tools > Lookup Account Information > select Program Name > enter Name & Phone Number utilized for the Synchrony financing application
 - If contractors are having issues finding the cardholder number in Business Center, please call Synchrony Merchant Services at 888-222-2176 > select option 2 > select option 2 again
- All program participation is subject to review and audit by the Sales and Marketing Programs department. Any program participation determined to be non-compliant will be denied.

Additional Terms and Conditions

- Credit is extended by Synchrony bank. Rates subject to change. Synchrony is the exclusive residential finance provider in the United States for this program.
- Synchrony may have additional Terms & Conditions beyond those stated within this document.
- Non-compliance with any program terms or conditions may render distributor and/or contractor ineligible to participate in the program.
- Johnson Controls and Synchrony Bank reserve the right to change or discontinue the above financing promotion at any time without notice.
- Activation Fee: Customers will be charged a one-time fee of \$29 on their initial purchase. This does not apply to future purchases. Promotional Updates: Merchants may change promotions at any time by logging into Business Center at: bc.syf.com. Split Tickets: Split tickets between multiple Synchrony Bank credit card programs and/or other lenders are not allowed. Synchrony reserves the right to restrict available promotions by merchant. Contact your Synchrony sales representative at 1-877-891-9803 to learn more.

Enrollment and Funding

1. Present financing every time you sell YORK equipment to homeowners.
2. Process consumer financing application via Synchrony Transact™ or Synchrony's paper process using your JCI program Merchant Number with Synchrony.
3. Complete installation of equipment in customer's home.
4. Submit sales slip for funding by fax or via Business Center using your JCI program Merchant Number with Synchrony.
5. Submit claim for contractor fee rebate on financed sales of qualifying equipment via SolutionNavigator.com > Marketing Dashboard > Menu > Promo Financing.
6. Claims must be submitted **within 30 calendar days of the sale funded date**. Rebates are paid on sales funded within the promotion dates directly to the contractor by Synchrony via ACH within 72 hours of claim approval.

Revision History

Version No.	Release Date	Revision Description

Contact us at **833-242-7869** or **bts-ds-marketing@jci.com** for questions, feedback, or other support

