2026 Residential Co-Op Marketing Fund Guidelines

ClimateMaster Residential Distributors • 2026 Program

The Co-Op Marketing Funds Program is designed to support our distributors and their dealers with funds that support their promotion of our brand. This policy applies to ClimateMaster Residential Distributors who do local advertising and/or implement activities that will drive their ClimateMaster sales. This is a shared (co-operative) contribution to offset marketing costs. Distributors can apply for fund reimbursement through the link below, and our Co-Op administrator will be prompted to review and approve the request up to 50% as long as the activity meets our guidelines and the distributor's Co-Op Marketing Fund balance.

Co-Op claims must be submitted within 60 days of your incurred expense.

We want to make it easy for you to advertise and market our ClimateMaster brand of products in your area while also ensuring our brand standards are upheld.

Program at a Glance

Up to 50% Eligible claims may be reimbursed up to 50% as an account credit memo.	**$500 / Month** Literature is available at no charge up to $500 per month. Shipping charges still apply. (Customers can place literature orders through normal means *Not the program.) Shipping charges can not be claimed for co-op.
Up to 60 Days Submit claims no later than 60 days from the invoice date. Year-end deadline is January 15.	**Pre-Approval** Activities not listed in these guidelines should be pre-approved by your sales leader before proceeding.

What's Changed

- Marketing funds are for marketing and advertising purposes only.
- No trip or event reimbursement unless the event is expected to generate sales.
- Training reimbursement is currently paused.
- Literature is now available at no charge up to $500 per month; (Customers can place literature orders through normal means *Not the program.)
- If a planned activity is not listed in this document, obtain pre-approval from your sales leader before proceeding.

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How to Submit a Claim

1. Complete the online claim form: https://bit.ly/4uPhLUu
2. Attach all required documentation, including a paid invoice and proof of activity. See the documentation matrix later in this guide.
3. Submit the claim no later than 60 days after the invoice date. The final year-end submission deadline is January 15.
4. If the claim is approved, reimbursement will be issued as an account credit. Paper checks are not issued.

Eligible Activities

Advertising

Your advertising efforts using our approved ClimateMaster branding are eligible for up to 50% reimbursement in the form of an account credit with pre-approval, adherence to guidelines, and receipts to support the claim. Activities featuring other manufacturer brands will have reduced reimbursement as is appropriate.

Reimbursable expenses include:

- Print advertising in newspapers and magazines
- Billboards, both digital and static
- Direct mail
- Vehicle wraps
- Building signage
- TV advertisements, including streaming service ads
- Sales incentive contests
- Radio advertising
- Google/Bing Adwords or keyword campaign
- Geothermal website creation or development
- Digital advertising online (placement only; design services are not reimbursable)
- Other local market activities with prior approval from your sales leader - please include pre-approval with your submitted claim

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Events & Training in Your Customer Territory

Events hosted in your territory may be eligible for partial reimbursement in the form of an account credit based on pre-approval, adherence to guidelines, and receipts to support the claim. Keep in mind that if ClimateMaster is not the only vendor brand that reimbursement will decrease as related to the amount of other brands. (25% if two vendor brands are represented.)

- Home expos and trade shows
- Demo units for trade shows, training, or to display in your local showroom
- Training – instead of reimbursement for training at your facility, distributors can now order literature for free (shipping costs apply) to help offset training costs. (Customers can place literature orders through normal means. *Not the program) Shipping charges can not be claimed for co-op.)
- Please reach out to your sales leader for other events or activities in your area for pre-approval before proceeding
- Please note that events will not be approved if they are not intended to grow sales. Customer retention/networking will go through the business unit.

Promotional Branded Merchandise

- Goods purchased from our online merchandise store are compliant with our brand guidelines and are therefore pre-approved for Co-Op reimbursement
- Branded goods purchased outside of our merch store must align with our brand guidelines and have a clearly visible ClimateMaster logo (no “hidden” logo – we will not approve if the logo is not visible). If there are questions, please get pre-approval.

Non-Eligible Items

- Any Taxes
- Customer Retention/Networking Trips
- Credit Card Fees
- Gratuities
- Merchandise with "Hidden" Logos
- Agency Fees

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Claim Documentation Guidelines

Type of Marketing	Logo Usage	Proof of Project	Paid Invoice
Print advertising	CLM logo equal to other manufacturer logos in ad	Tear sheet of ad and Publication name	Copy of paid invoice (not estimate)
Billboards (digital or static)	CLM logo legible	Photo of the board	Copy of paid invoice
Direct mail	CLM logo equal to other manufacturer logos in ad	Sample of mailer	Copy of paid invoice
Vehicle wraps	CLM logo visible	Photo of the vehicle	Copy of paid invoice
Building signage	CLM logo visible	Photo of the signage	Copy of paid invoice
TV ads (including streaming)	ClimateMaster name mentioned twice and the logo displayed at least 5 seconds	Copy of the ad and run schedule	Copy of paid invoice
Sales incentive contests (specific to ClimateMaster sales)	Logo prizes preferred but not required	Description of contest and photos of prizes	Copy of receipts for prizes
Radio ads (including streaming)	ClimateMaster name mentioned twice	Copy of the script and run schedule	Copy of paid invoice
Google/Bing Adwords (including streaming)		Copy of ad and key words used	Copy of paid invoice
Geothermal website creation/development	ClimateMaster products are the only product line on site	Email from sales leader with pre-approval, url	Copy of paid invoice
Digital advertising	CLM logo legible	Screenshot of ad, url	Copy of paid invoice
Home expos & trade shows	CLM products featured and logo visible	Picture of booth and products	Copy of ClimateMaster invoice
Demo or display units	CLM badge on products	Photo of use	Copy of paid exhibit invoice
Branded merchandise from CCG online store	Automatically approved		Copy of paid invoice
Branded merchandise from external vendor	Logo visible and equal to other logo size	Photo of merch with logo plainly visible	Copy of paid invoice