HVAC Replacement Estimate

Estimate # _____ Date _____ Valid until _____

YOUR LOGO

YOUR COMPANY

Company name

License #

Phone / email

Estimator

CUSTOMER AND SITE

Customer name

Phone / email

Service address

Home sq ft / year built

Existing system (type, age, tonnage)

Load calc / recommended size

YOUR OPTIONS

	Good	Better	Best
Outdoor unit (brand / model)			
Indoor unit: furnace / air handler / coil			
Efficiency (SEER2 / EER2 / HSPF2 / AFUE)			
Staging (single / two-stage / variable)			
Thermostat			
Parts / labor warranty			
Equipment	$	$	$
Labor (install crew, hours)	$	$	$
Materials: line set, pad, disconnect, whip, drain, refrigerant	$	$	$
Permit and inspection	$	$	$
Removal and disposal of old equipment	$	$	$
Add-ons (IAQ, surge protector, duct repair)	$	$	$
Rebates / discounts	−$	−$	−$
Sales tax	$	$	$
Total investment	**$**	**$**	**$**
Or monthly with financing (term / APR)	$ /mo	$ /mo	$ /mo

SCOPE OF WORK AND NOTES

What is included, what is not (ductwork, electrical upgrades, drywall), expected install date and duration.

ACCEPTANCE

Option selected: ☐ Good ☐ Better ☐ Best Deposit due today: $_____ Balance due on completion: $_____

Customer signature

Date

Estimator signature

Free template from PickTier · picktier.com · Build this on an iPad and get it signed and paid on the spot.