

LEVOLOR®

FEDERAL TAX CREDIT 2024

Qualifying Product
Document
Effective 5/16/2024

Cellular Shades

HOW TO USE THIS DOCUMENT

To determine what LEVOLOR® Cellular Shade products qualify for the Federal Tax Credit, please follow the steps below.

- 1) Determine the Climate Zone (see below) of the **residence** where the shades will be installed. This step is crucial because the specific fabric and operating system configurations that qualify for the Federal Tax Credit may vary based on the residence's Climate Zone.
- 2) Refer to the **Product Qualification Reference Chart**, which can be found on Page 3. Fabrics not listed do not qualify.
- 3) In the **Product Qualification Reference Chart**, find the fabric, operating system and Climate Zone.
 - If the fabric falls within a **LIGHT BLUE** area, the fabric qualifies for the Federal Tax Credit. Available operating systems include LEVOLOR® InMotion™ Motorization and Cordless Lift in both Bottom-Up and Top-Down/Bottom-Up.
 - If the fabric falls within a **DARK BLUE** area, not all options qualify for the Federal Tax Credit. Refer to the **Qualifying/Non-Qualifying Size Grids**, for the applicable operating systems.

IMPORTANT: Any product purchased with the following systems and design options **DO NOT QUALIFY:**

- InMotion™ Motorization operating system without the InMotion™ Hub.
- End Mount
- Outside Mount
- Cut-Outs
- Two-on-One Headrail
- Three-on-One Headrail
- Day/Night
- Specialty Shapes
- Vertical Application
- Skylights
- Arches



HOW TO DETERMINE YOUR CLIMATE ZONE

[CLICK HERE](#), or scan the QR code to access The International Code Council website. Your Zone will be noted beside your State and County.

For more information on the Federal Tax Credit, visit www.LEVOLOR.com/tax-credit.
InMotion™ Motorized shades must be purchased with InMotion™ Hub in order to qualify.

PRODUCT QUALIFICATION REFERENCE CHART

	Qualifying
	Non-Qualifying

LEVOLOR® Cellular Shades							
Fabric	Cell Size & Opacity	Fabric Code (All Colors)	Qualification Zone	InMotion™ Motorization Bottom-Up	InMotion™ Motorization Top/Down Bottom-Up	Cordless Lift Bottom-Up	Cordless Lift Top Down/Bottom-Up
Cambrica	¾" Light Filtering	H72	Zones 1 -3				
			Zones 4 -8				
Cambrica	¾" Blackout	H75	Zones 1 -3				
			Zones 4 -8				

InMotion™ Motorized Shades must be purchased with InMotion™ Hub to qualify. Fabrics not listed on this this page do not qualify.

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FEDERAL TAX CREDIT

ENERGY EFFICIENT HOME IMPROVEMENT CREDIT FREQUENTLY ASKED QUESTIONS (FAQs)

Please review the LEVOLOR® Manufacturer's Certification Statement and the LEVOLOR® Qualifying Product document available at www.LEVOLOR.com/tax-credit for specific qualifying product details and restrictions, and also consult with your tax advisor to determine other eligibility requirements for claiming this particular Federal Tax Credit opportunity.

Below are answers to some frequently asked questions.

Q: What is the Federal Tax Credit for Energy Efficient Home Improvement Credit?

A: To help provide incentives for homeowners to make energy-efficient home improvements, the federal government offers tax credits as a way to offset the costs of these upgrades. Per the Inflation Reduction Act of 2022, the Federal Tax Credit is available on an annual basis through December 31, 2032.

- Qualifying product(s) must be installed in an existing residential principal residence (no secondary homes or rental properties) by December 31 of the qualifying tax year.

Q: How does the Federal Tax Credit Work?

A: This is not cash in your hand (like a rebate, which gives you cash back after you've made a purchase), but a tax credit—which is an amount of money that you subtract directly from the taxes that you owe.

Q: Which LEVOLOR® products currently qualify for the Federal Tax Credit?

A: Certain LEVOLOR® Cellular Shades with qualifying fabrics, operating systems and size combinations, that are inside mount over double pane, clear glass windows currently qualify for the Federal Tax Credit. For specific qualifying products, details and restrictions, refer to the Manufacturer's Certification Statement and related Qualifying Product Document available at www.LEVOLOR.com/tax-credit.

- Products must be installed by December 31 of the qualifying tax year.
- Qualifying products meet applicable energy performance standards as identified in the International Energy Conservation Code (IECC) for U-factor and Solar Heat Gain Coefficient for the specified climate zones.
- InMotion™ Motorized shades must be purchased with InMotion™ Hub in order to qualify.

Q: What is a Manufacturer's Certification Statement?

A: A Manufacturer's Certification Statement is a signed statement from LEVOLOR® (which, along with the Qualifying Product Document) certifies whether the specific product purchased by you qualifies for the tax credit, subject to specified product details and restrictions.

- You can find the Manufacturer's Certification Statement and related Qualifying Product Document at www.LEVOLOR.com/tax-credit.

Q: How much do you receive for the Federal Tax Credit?

A: Qualifying products are eligible for a tax credit equal to 30% of the "purchase price" of the products, up to a maximum annual amount of \$1,200.

- Applicable purchase price is the amount paid by you for the products(s), including sales tax, and does not cover the costs for measuring or installing of qualifying products. If sales tax charged on both the shade and the installation labor, only the portion of the sales tax applicable to the shade, and not any sales tax applicable to the labor, is included in the "purchase price" that you apply to the 30%.

Q: What is the maximum Federal Tax Credit amount I can get each qualifying tax year?

A: Even if you purchase multiple qualifying products in a year, the maximum amount of the Federal Tax Credit during any taxable year is \$1,200. For example, if you spend up to \$5,000 during the year on a single qualifying product or multiple qualifying products, you are only eligible to receive 30% up to a \$1,200 cap (30% of \$5,000 = \$1,500 and you receive 30% up to a \$1,200 under the tax credit). Consult with your tax advisor to determine your eligibility for this tax credit.

Q: What is the time frame during which the Federal Tax Credit can be earned on qualifying LEVOLOR® products?

A: Starting May 16, 2024 -December 31, 2032, the \$1,200 annual limit applies, meaning you can claim the maximum credit for each taxable year, for purchases in those years, through year-end 2032. The Manufacturer's Certification Statement must apply to those products and corresponding receipt purchase dates. Consult your tax advisor for further details.

Q: What do I need to submit for the Federal Tax Credit?

A: You should retain your itemized LEVOLOR invoice, proof of payment (receipt), a copy of the applicable Manufacturer's Certification Statement and the applicable pages of the Qualifying Product Document that addresses the specific products that you purchased. To claim the tax credit, you will need to complete the applicable IRS Forms and submit them with your tax returns. The credit is usually taken on Form 5695. Please note that the IRS may change or update this tax form, so you should consult your tax advisor as the correct form to file or visit the IRS website.

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Manufacturer's Certification Statement

This Manufacturer's Certification Statement ("Statement"), effective as of May 16, 2024, identifies those LEVOLOR® Cellular window covering products that, when purchased with specified qualifying fabrics and hardware (operating systems) and used in conjunction with double-pane, clear glass windows, qualify as "Eligible Building Envelope Components" for a Federal Tax Credit for tax year 2024 as Non-business Energy Property under Internal Revenue Code Section 25C (the "Credit"), as modified, extended and amended by the Inflation Reduction Act of 2022 (the "Inflation Reduction Act").¹

Qualifying products must be installed in the purchaser's primary residence. Products that otherwise qualify for the Credit, but which are installed in a leased or rented residence do not qualify for the Credit. Qualifying products must be installed and used in accordance with the manufacturer's instructions for the installation and use of the applicable products. The original use of the subject product must commence with the purchaser and the product must be expected to remain in use for at least 5 years. A hub is required when purchasing qualifying products with InMotion™ Motorization.

Qualifying products may not have any of the following options or features: (i) end mounting (ii) outside mounting, (iii) cut-outs, (iv) two-on-one headrail, (v) three-on-one headrail, (vi) day/night, (vii) specialty shapes, (viii) vertical application, (ix) skylights, (x) arches.

More particular information as to those qualifying products (installed and used as specified above) that meet (i) the prescriptive criteria for all "climate zones" as established by and specified in the 2021 International Energy Conservation Code and (ii) all other requirements to make them eligible for the Credit in the Qualifying Product Document that can be accessed here. Further information regarding the tax credit, energy efficiency and LEVOLOR® products can also be found in the FAQs at www.LEVOLOR.com/tax-credit.²

Under penalties of perjury, I declare that I have examined this Statement and, to the best of my knowledge and belief, the facts are true, correct and complete.



Sanjiv Chhatwal
LEVOLOR, Inc.
President

¹ The information contained in this Statement is based on federal statutes, regulations and guidance in effect as of the date hereof, including, but not limited to, IRS Notices 2009-41 and 2013-70. LEVOLOR® may, but is under no obligation to do so, update and amend this Statement as and when new information and/or interpretations from the IRS are obtained. LEVOLOR® does not intend to and is not providing legal or tax advice and recommends that purchasers consult with their own tax advisors as to their eligibility for the subject tax credit. LEVOLOR® bears no responsibility for validating or obtaining tax credits(s) and expressly disclaims any responsibility for whether a particular purchase or application qualifies for the Credit described herein.

² The referenced website link also contains information as to those LEVOLOR® products with certain specific fabric, hardware system and size features that do not qualify for the Credit. Purchasers are solely responsible for determining whether their product purchases are eligible or not eligible for the Credit. Due to ongoing product changes and testing and certification requirements, the information provided on the referenced website link may change over time.