

3-Step Conversation Checklist for the Inflation Reduction Act

The Inflation Reduction Act incentives are a great opportunity for contractors to close more and bigger deals. Here's a quick checklist to help you start the IRA conversation with your homeowner customers.

Step one: Start with the savings possibilities

- Use our [IRA infographic](#) to explain what rebates and tax credits are available for the project.
- Help homeowners understand how these incentives can lower their overall project cost.

Step two: Don't forget to mention regulations

- The IRA incentives are available to most, but there are limitations. Take some time to become familiar with [these exclusions](#) so you don't mislead your customers.
- Refer customers to the [Rewiring America calculator](#) to see what they might be able to qualify for.
- Make sure your customers understand that no tax credit or rebate is 100% guaranteed. Recommend they find a tax professional to help them understand all of the specific financial details.

Step three: Help plan projects

- Highlight other projects that have IRA savings to encourage customers to start new projects and benefit from more savings.
- Use financing options to make projects even more affordable and maximize customer savings.

This document does not constitute professional tax advice. It should not be used as the only source of information when making purchasing decisions related to residential energy or for tax filing. Consult a tax professional to determine what makes sense for you.

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