

HVAC Maintenance Agreement Template

Create an editable starting point for recurring HVAC maintenance visits, coverage, payment, renewal, and signatures.

Instructions

Define the exact equipment, visit count, included services, exclusions, price, renewal, cancellation, and access requirements. Remove any benefit your company does not actually provide.

Parties and term

- [] Service company legal name: _____
- [] Customer legal name: _____
- [] Effective date: _____
- [] Initial term: _____
- [] Service address: _____

Covered equipment

- [] Equipment list: _____
- [] Manufacturer: _____
- [] Model: _____
- [] Serial number: _____
- [] Location: _____
- [] Coverage limitations: _____

Scheduled visits

- [] Number of visits: _____
- [] Approximate timing: _____
- [] Scheduling process: _____
- [] Rescheduling terms: _____

Included services

- [] Inspection tasks: _____
- [] Cleaning tasks: _____
- [] Adjustments: _____
- [] Measurements: _____
- [] Written report: _____
- [] Filter treatment: _____

Program benefits

- [] Priority service: _____
- [] Repair discount: _____
- [] Diagnostic discount: _____
- [] Other approved benefit: _____

Exclusions

- [] Repairs and parts: _____
- [] Emergency service: _____
- [] Unsafe or inaccessible equipment: _____

- _____
[] Pre-existing conditions: _____
[] Code upgrades: _____

Customer responsibilities

- [] Safe access: _____
[] Utilities available: _____
[] Accurate equipment information: _____

- _____
[] Notice of changes: _____
[] Payment: _____

Price and payment

- [] Agreement price: _____
[] Billing schedule: _____
[] Taxes: _____
[] Late or failed payment terms: _____

Renewal and cancellation

- [] Renewal method: _____
[] Renewal notice: _____
[] Cancellation method: _____
[] Refund or balance treatment: _____

Access and limitations

- [] Property access authorization: _____
[] Weather or unsafe-condition delays: _____

[] Limitation language reviewed by counsel: _____

Signatures

- [] Customer name and signature: _____
[] Company representative and signature: _____

[] Signature dates: _____

Important

General business template only; not legal advice. Contract, automatic-renewal, cancellation, consumer, and licensing rules vary. Obtain legal review before use.