



CHANGES TO WISCONSIN SALES TAX EXEMPTIONS STATUTE

Lisa Swance

There have been some recent law changes to the Wisconsin Sales Tax exemptions statute 77.54 (9m) pertaining to contracts with exempt entities as of January 1, 2016. From the Wisconsin Statute:

“The sales price from the sale of and the storage, use, or other consumption of tangible personal property, or items or property under s. 77.52 (1) (b) or (c), sold to a construction contractor who, in fulfillment of a real property construction activity, transfers the tangible personal property, or items or property under s. 77.52 (1) (b) or (c), to an entity described under sub. (9a) (b), (c), (d), (em), or (f), if such tangible personal property, or items or property, becomes a component of a facility in this state that is owned by the entity. In this subsection, "facility" means any building, shelter, parking lot, parking garage, athletic field, athletic park, storm sewer, water supply system, or sewerage and waste water treatment facility, but does not include a highway, street, or road.”

In the past, for an exempt entity that you were selling to, we would need to bill that entity direct and receive payment from that entity. With the new law, **for sales that qualify** and you have an exemption certificate, you are allowed to purchase the materials transferred to that entity without tax. We no longer need to set up a “project” account to bill to separately for your sales to exempt entities.

At this time, there isn't an updated Sales Exemption form from the State, that will be coming. In the meantime, the form you need to provide us with will be the standard S-211. On page 2 check the box “Other purchases exempted by law” and write on the line “Exempt under Sec 77.54 (9m) Wis. Stats”. We do not need the end user's tax number. It is your, the contractor's, responsibility to accept the form and know if the entity and purchases qualify.

Things to keep in mind, the construction must be for a qualifying exempt entity, the property must become a part of a facility in Wisconsin that is owned by the exempt entity, and the property must be transferred to the

qualifying exempt entity.

So who is a qualifying entity?

- A county, city, village or town within Wisconsin
- A public school district in Wisconsin
- A county/city hospital established under sec 66.0927, Wis Stats
- A metropolitan sewer district organized under sec 200.01 to 200.15 or 200.21 to 200.55 Wis Stats
- Any joining local water authority created under sec 66.0823 Wis Stats
- Any nonprofit organization that holds a WI Certificate of Exempt Status (CES) number
- A non-Wisconsin nonprofit organization if it is organized and operated exclusively for religious, charitable, scientific or education purposes, or for the prevention of cruelty to children or animals and no part of the net incomes inures to the benefit of any private stockholder, shareholder, member or corporation

IMPORTANT NOTICE – This exemption does not apply to all exempt organizations.

Some non-qualifying examples are:

- Chambers of commerce
- Volunteer fire departments
- Professional organizations
- Labor organizations
- A federal government unit
- A public college, university, or technical college
- A WI nonprofit organization that does not hold a WI CES number

This is just a general overview and does not include all restrictions, etc. Please follow up with your tax professional for guidance and interpretation of the new law and how it applies to you and your business.

Sign up for withholding tax updates/news at <https://www.revenue.wi.gov/html/lists.html>

There are some Contractor Workshops coming up in May and June being presented by the Wisconsin Department of Revenue. We will send more information as it becomes available. We will also post any new information on our website at www.monroeequipment.com.

NEW +95% EFFICIENT MAGIC-PAK ELIGIBLE FOR \$150.00 PER UNIT WFOE INCENTIVE

Wisconsin Focus on Energy (WFOE) is now offering an Energy Savings Program to multi-unit and condo owners. This incentive is valid for replacing existing 80% vertical packaged units with 95% Magic-Pak units. The incentive is also available for new construction projects.

Program Eligibility and Requirements

- Must be an owner/manager of an apartment or condo building with 4 or more units.
- The building(s) must be served by a participating Wisconsin electric or natural gas utility.

Complete the [Multifamily Energy Savings Program Eligibility Tool](#) (.xls) and for an assessment by an Energy Advisor. In doing this, please reference the [Multifamily Energy Savings Eligibility Tool Guide](#).

- Receive pre-approval on any custom projects, or complete a prescriptive application. Additional conditions apply. See application for details.



Comfort Sync + EIM Bundle INTRODUCTORY SPECIAL

Offer valid April 1- June 17, 2016.

\$266.65

- Create WiFi enabled installations with this latest technology combo
- Compatible with ANY residential HVAC system
- 5-Year warranty; 10-Year warranty with any registered Allied Air system

Comfort Sync



Electronic Interface Module (EIM)



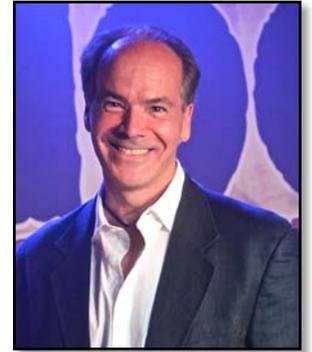
P.O. must reference **Part Number R06429D440** to receive this special promotional price.

GETTING TO KNOW YOU

Barb Beckett

Joseph Scala joined Monroe Equipment as our Commercial Sales & Marketing Manager October 2015. In his role as key contact for commercial sales, he works with large mechanical contractors, construction companies, architects, engineering firms and developers to build awareness and grow our Commercial Business.

Joseph truly enjoys the challenges of sales and marketing. He started his career in advertising as a Copywriter and throughout his career he has been fortunate to have had several great mentors and a wide range of experiences. He feels strongly that this is what he was meant to do.



Joseph grew up in northern New Jersey. He is the youngest of seven siblings. At a very young age, Joseph would go to work with his dad, who was a mechanic, at his uncle's garage and work Saturdays and summers pumping gas. Joseph was grateful to be able to spend time with his dad and this experience instilled the importance of hard work and the value of money.

Because of the tremendous adversity she dealt with, his mother has been his biggest inspiration and influence in his life, with his wife coming in a close second. Joseph is most proud of chairing the Appleton Alzheimer's Walk and being involved with SOAR of the Fox Cities, whose mission is "Empowering People with Differing Abilities".

Joseph has many talents, one of them is singing. He has performed the National Anthem and God Bless America at many Wisconsin events including UW, UWO, and UWGB athletic events; Timber Rattlers Baseball, and others. I plan to see him sing at the Lakeshore Chinooks baseball games on June 8th and/or August 2nd.

He has also played tennis competitively since the age of 9 or 10 and it remains his favorite leisure activity. Also for fun, he enjoys spending time with his wife, Debbie. They love to follow sports and are both news-hounds, and enjoy discussing the issues of the day.

COLOSSAL COOLING PROMOTION REMINDER

Now through June 17, 2016, you can earn promotional items based on qualifying orders.

\$50,000+ Order Amounts

Matthews Bow
LG 55" 4K Ultra HD TV
Microsoft Surface Pro 4

\$25,000+ Order Amounts

2-Pack Green Bay Packer Tickets
Yeti 65 Cooler
Milwaukee Tool 5-Piece Combo Kit

\$10,000+ Order Amounts

4-Pack Brewers Club Level Tickets
Milwaukee Tool Heated Jacket
Milwaukee Tool Combo Drill Kit

The Details...

1. The Allied Air Colossal Cooling Promotion is available to all Armstrong Air, Air Ease and Concord dealers when placing new orders for qualifying, motor bearing products on a single order with a single ship date within the specified promotion period of April 1, 2016 thru June 17, 2016. (Note: project orders with special pricing do not qualify for this promotion.)
2. Promotion items may be redeemed immediately or qualifying orders may be accumulated throughout the program up to and including June 17, 2016 in order to achieve a higher level of award.
3. Only items bearing one of the three brand names will be included for the purpose of determining the qualifying dollar level the order.
4. No substitutions for alternate awards or cash are permitted.
5. Monroe reserves the right to change or terminate this program at any time without notice.



THE POWER OF POSITIVITY

Matthew Schneider

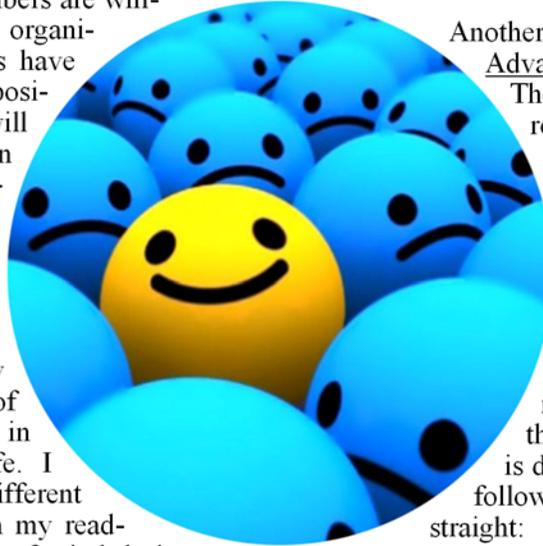
One of the first lessons I learned in management is that businesses will only be as successful as the team allows them to be. The single most important factor to the limits with which an organization can achieve is how much the individual team members are willing to invest into the success of the organization. Numerous scientific studies have proven that individuals who are positive, content and appreciated will achieve greater levels of success in the workplace and individual successes fuel team success. In simple terms “Attitude is Everything”.

I have been fascinated by this concept ever since one of our professional trainers shared some study data with me and I have put a lot of the information I have gained to use in my personal and professional life. I thought that I might share two different studies that stuck with me through my readings and that I am keeping at front of mind during my daily interactions with my team.

From the book How Full Is Your Bucket, authored by Tom Rath and Donald Clifton, Ph.D. researchers found that every person is genetically pre-dispositioned to be either positive or negative. That’s right. Positivity is genetically woven into one’s DNA. Genetically positive people require very little stimulus to be positive. They exist in a sort of positive bubble, where genetically negative people require far more positive interactions to keep them on the positive side of equation. Regardless of where people are genetically pre-determined, the scientists found that on average, individuals need a minimum of five positive interactions to every one negative interaction just to remain neutral. Additionally, those individuals who were genetically pre-dispositioned to be negative, needed an amazing 13 positive interactions to just one negative interaction to remain neutral.

Knowing this information, the researchers did tests where they put groups of employees under the direct management of individuals that were determined to be genetically positive or negative. The research groups that were managed by “positive” managers, who gave much more praise for jobs well done, etc. outperformed the groups managed by “negative” managers who spread doom and gloom by exponentially larger outputs. Coincidentally, they took the performing (positive) groups of co-workers

and switched managers, putting them under the “negative” managers and the production immediately dropped to that of the original “negative” groups proving that there is power in positivity!



Another awesome book is The Happiness Advantage, authored by Shawn Achor.

The number of scientific studies surrounding happiness and professional success documented in this book will make your head spin, but the one that I gravitated to the most was on a little more personal level. Mr. Achor described a research study regarding the parallel relationship between habits, dopamine production in the brain and sales performance. As a sales manager, of course this perked my interest. The study that is described had a test group perform the following five things daily for 21 days straight:

- Say “thank you” to one NEW person daily, with focus on gratitude.
- Write down one NEW thing that they were grateful for on a daily basis.
- Perform 30 minutes of light exercise, such as walking or jogging, daily.
- Unplug for a minimum of 10 minutes daily (no phone, radio, laptop, tablet, TV).
- Perform one act of INTENTIONAL kindness daily for someone else.

The test group who purposefully changed their routine to include these five things, experienced elevated dopamine production in their brain, self-described themselves as being happier and more positive than previous and saw a 50% increase in same product/behavior sales between the test and the control group! Message to all salespeople. Want to increase your sales performance? **Focus on making yourself more POSITIVE**

BETTER BUILDINGS CONFERENCE

Joseph Scala

Monroe Equipment joined over 850 industry leaders in Wisconsin Dells by exhibiting at The Better Buildings Conference in March. Professionals met to get relevant information needed to keep up with industry changes and prepare for customer demands of the future. We swapped ideas, investigated the latest technologies and products available and shared competitive knowledge.

Monroe's booth featured **Viessmann** and **LG**, as well as the entire product line carried by Monroe Equipment.

We had the opportunity to meet with many of our customers and a wide variety of professionals involved in the specification of HVAC Equipment.



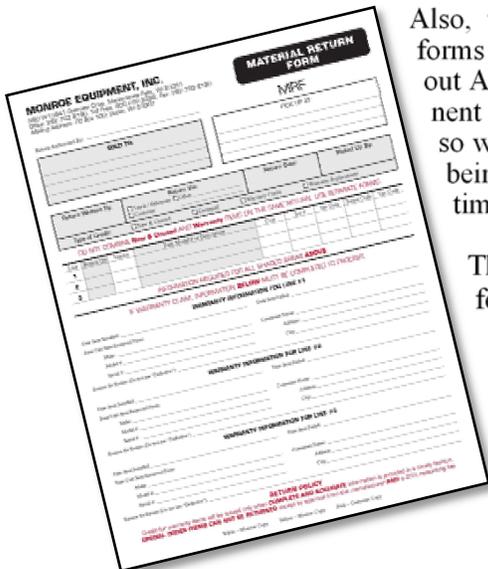
WARRANTY REMINDER

Lori Pantle

Just a quick note regarding Warranty Claim Forms.

For all Allied/Armstrong Air/Air Ease Warranty claims, please use the [Allied Warranty Claim Form](#), which can be found on our website under FORMS.

All other miscellaneous warranty claims should use the [MRF Form](#) (also found on the website under FORMS).



Also, when filling out the forms please be sure to fill out ALL information pertinent to that claim. Doing so will help in your claim being processed in a timely manner.

Thank you in advance for your cooperation!

PARTS DEPARTMENT

Rich Taylor

As another summer approaches, Monroe Equipment has all of your air conditioning needs covered. From Nu-Calgon products, such as coil cleaners, vacuum pump oil and RX-11 Flush, to Yellow jacket gauge sets and Appion Recovery machines. We will do our best to be your "one-stop" shop and we look forward to a HOT 2016.

Don't forget to visit us online at www.monroeequipment.com and look for our biweekly online promos and our other specials.

Upcoming Events
MAY 28 & 30 - Menomonee Falls & Oshkosh
Closed for Memorial Day

The Monroe Igniter is a quarterly publication created exclusively for customers of Monroe Equipment, Inc.



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