

# FilterPro IAQ

Indoor Air Quality + HVAC Preventive Maintenance  
a FilterPro USA company

RFP 2302KM  
HVAC FILTER SERVICES  
9/6/2022

RFP prepared by:  
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Wilson Meadows, General Manager FilterPro USA

RFP prepared for:  
**Gwinnett County Public Schools**



State of Alabama  
Board of Heating and Air Conditioning Contractors  
License # 15012  
Expires: 12/31/2022

E-Verify: Filter Pro USA LLC  
Company ID Number: 807276  
Date of Authorization: 8/19/2014

## EXECUTIVE SUMMARY

Representatives of the Gwinnett County Public Schools,

We appreciate your time and efforts towards greater indoor air quality and improved energy and mechanical efficiencies, and we thank you for the opportunity to participate in this process. FilterPro USA has worked hand in hand with dozens of school systems in the Southeast as the primary provider of air filter materials and installation services. Our mission is to ensure all individuals who visit or frequent a Gwinnett County School site breathe clean air and to assist the appropriate school departments in achieving mechanical efficiencies and longevity. After nearly 40 years of air filtration services experience, we believe the value and reliability of our services cannot be beat.

In this RFP, we understand the School District's focused efforts to protect the health of its students, teachers, administrators, parents, employees, and all other stakeholders. We also understand the importance of regular preventative maintenance and the effect it has on equipment replacement costs and energy usage. In RFP 2302KM the Gwinnett County Schools are searching for a qualified contractor to perform air filter change-out services at all sites. At FilterPro USA, we have all the tools necessary to help the School District achieve these goals! Our intent with this proposal is to be the primary full services vendor for HVAC Filters. We currently have staff readied for a start-up of Gwinnett School District account. For consistent services, our methodology for staff dedicated to the School District account is to hire and equip local technicians who are 100% dedicated to servicing Gwinnett County Schools. We hope you see in our proposal the many benefits of utilizing FilterPro USA.

We understand and will meet the minimum requirements as stated in Section 4.0.

- ✓ FilterPro is licensed to conduct business in Georgia and is in good standing with all federal, state and municipal jurisdictions.
- ✓ FilterPro currently has the staff for the start-up of this contract and will hire local staff to service this contract for the length of the agreement.
- ✓ FilterPro has the required licenses, certifications, and subject matter knowledge.
- ✓ FilterPro can provide all required services in an equitable fashion throughout the district.
- ✓ FilterPro is fully capable of delivering a solution inclusive of all required services.

*Wilson Meadows*

*Vice President*

833-274-5688

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September 6

2022

A detailed overview to enhance potential & existing client knowledge of FilterPro USA's service & capabilities.

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**Additional Documents Uploaded in Additional Supplier Information:**

**Attachment 1**

- **Filter Pro Code of Ethics NAFA**
- **National Air Filtration Association Certificates**
  - **Wilson Meadows CAFS**
  - **Brian Pearson CAFS**
  - **Erich Hamann CAFS**
- **Minority-owned business Certification**
- **Filter Pro USA Sales tax certification State of Georgia**
- **Filter Pro USA HVAC Certification**
- **Filter Pro USA Business Licenses**
- **Filter Pro USA Merv 13 media test reports**

**Attachment 2**

**Filter Pro USA HSE Manual**

## **1. PROPOSAL OVERVIEW**

Representatives of Gwinnett County Public Schools, we appreciate your time and efforts towards greater indoor air quality and improved energy and mechanical efficiencies! This proposal serves to provide information and examples of our abilities and value we can add to your organization.

We thank you for the opportunity to participate in this process and look forward to all future opportunities to grow a partnership with Gwinnett County Public Schools.

If there are any questions, concerns, or awards please contact me at any time, 24/7 at 256-767-5122 or cell phone at 615-426-2756.

Wilson Meadows  
Vice President  
[wmeadows@filterpro.com](mailto:wmeadows@filterpro.com)

## **2. WHAT WE DO**

FilterPro USA is an air filter manufacturer, distributor, and service provider. We are 100% American owned and managed, our products are 100% American made and our services are the best in the industry.

At FilterPro USA, we assist clients nationwide in managing and servicing every aspect of air filtration throughout their multi-site operations. We provide management and field teams with the necessary systems and company owned infrastructure to ensure ultimate success. Then we back it up with our web-based asset management software system, Facili Trac, which puts the important information at your fingertips.

We create a custom-tailored preventative maintenance program just for you. We remove the guess work so you can make accurate, reliable management decisions – making the most of your valuable time.

## **3. WHAT YOU CAN EXPECT**

With FilterPro USA, you can expect to receive professional services that are unrivaled in reliability and consistency. FilterPro operates its field teams in a dispatch/oversight format that engages the corporate office and service managers to be extremely hands-on, which allows our technicians to focus on the core work with less distraction. You can expect our technicians to be courteous and professional, and well informed of each site's requirements before arriving onsite. We have equipped all our technicians with iPhones and utilize the technology along with our proprietary HVACR software to deliver the greatest level of service in our industry, guaranteed.

You can expect to have a single point of contact for ALL sites under contract.

You can expect a turn-key solution: FilterPro maintains control of all materials and tools needed for the job and allows the customer to focus on other issues. No more storing materials and keeping up with schedules! No more disposing of soiled filters! No more reacting to mechanical and IAQ issues due to poor filter change-out consistency! FilterPro does it all AND always keeps you informed!

You can expect a supreme sense of urgency on behalf of all FilterPro staff members to meet the needs of your contract and to respond to any inquiry. Our culture promotes customer satisfaction and continuous improvement.

You can expect FilterPro to provide high quality products, and we guarantee to never use any product that does not meet the minimal statistical efficiencies (MERV) as stated in your contract.

You can expect extremely fast emergency response times. If indoor air quality is compromised, we can dispatch a team to your site to remediate with new materials within a matter of minutes. We credit this to our dispatch operations model and service management hands-on approach.

#### **4. COMPANY OVERVIEW**

FilterPro USA was established in 2014 from an acquisition of an existing filter service company headquartered in Florence, AL by a 30-year HVAC veteran. The company was founded on honesty, integrity, quality service and a job done right. FilterPro is a technician-owned company that has been built from the ground up – one satisfied customer at a time. We have been providing air filter change-out services for over 38 years!

Our company leads the industry in technology and utilizes it to provide our customers with the latest, most accurate information. We also offer our customers the industry's finest asset management tracking software with the infrastructure and systems in place to back it up. We currently service thousands of sites nationwide with over 100 million sq. ft. of temperature-controlled space. Our complex network of company owned assets works in concert to provide seamless service for our customers.

We view our customers as partners, and our focus is to help you accomplish your goals. We establish long term relationships with our clients – which is proven by customer retention.

In the state of Georgia, FilterPro has facilities in Clarkston, Cummings, Lithonia, Lawrenceville, Douglasville, Tifton, and Augusta.

FilterPro USA has become one of the most respected and tested self-performing filter service companies in the nation and continues to expand each year.

## Affiliated Organizations/ Memberships:



- a. NAFA- the National Air Filtration Association (NAFA) is a dynamic, non-profit trade association. NAFA members include air filter and component manufacturers, sales and service companies, and HVAC and indoor air quality professionals across the United States and in several foreign countries.



- b. ASHRAE- ASHRAE is a global society advancing human well-being through sustainable technology for the built environment. With more than 53,000 members from over 132 nations, ASHRAE is a diverse organization representing building system design and industrial processes professionals around the world.



- c. PRSM- Our association empowers retail facilities maintenance professionals to make informed business decisions, enhance their company's brand and advance their careers by delivering tools that improve operating efficiencies and reduce costs, providing world class conferences, identifying best practices and industry resources, offering educational tools, an industry designation and training, and facilitating business partnerships, referrals and networking opportunities.



- d. RFMA- The only association created by and for restaurant facility management professionals. RFMA's core purpose is to promote the advancement of the restaurant facility management professional.



- e. FSPMA- Our organization was established in 1960 with three (3) main objectives. First, to determine the nature, extent, and quality of non-instructional services required for the educational program, and to promote the development of these services by establishing the acceptable policies, standards, and practices. Second, to develop a working relationship with school administrators, managers, non-instructional, and instructional personnel, to foster, the programs through adequate facilities and environment. Third, to promote the professional advancement of school plant maintenance, operation, safety, energy management, and environment.



- f. GASFA - The Georgia Association of School Facility Administrators (GASFA) was organized in 1989 to promote better understanding and cooperation between state and system-level facility administrators, to address their concerns, and promote and stimulate their professional growth, in addition, it is GASFA's purpose to present a united voice in matters relating to facility administrators in Georgia Public Schools.

## 5. COMPANY TECHNICIANS

We hire and train the finest technicians in the industry. All technicians in our self-performing network are FilterPro W-2 employees. They are held to the highest standards for each service, as each tech must "sign-off" on work performed and every filter removed and replaced. Each technician goes through a training regimen called 2WR with experienced employees, pass a professional driving test, background check and drug test.

Each Technician is also equipped with an iPad which gives them access to site equipment and service history. These devices help to ensure the highest levels of service and billing accuracy.

We hire technicians who are local to our customer sites, to ensure timely response times and ease of access. You can be sure the tech working on your site is a local employee!

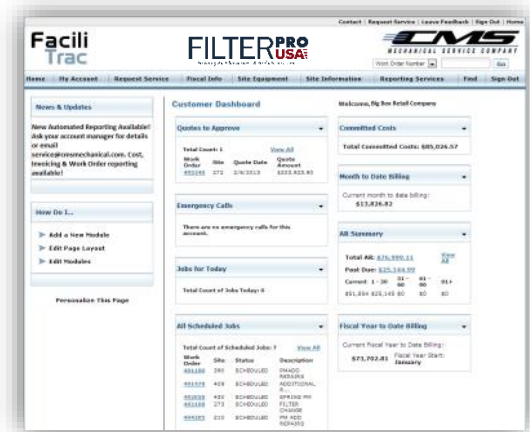
Our technicians write the date of installation on every filter installed. No guessing how old a filter is!

The FilterPro technician motto is “Consistent, Reliable, Professional.” Our technicians are the hands and feet of our business, and we promote this motto in all aspects of our work.

## 6. BEYOND THE BASICS

Beyond preventative maintenance filter services, FilterPro USA will be able to provide Gwinnett County Public Schools with specialized services and access to valuable tools and reports to help manage the IAQ aspect of your facilities. These services include:

- Spend Analysis Reporting
- Daily Communication Service Reports
- Single Point of Contact Account Management
- Speedy emergency response time
- Dedicated FilterPro W-2 employees
- Invoicing within 72 hours of completion
- Onsite Photography Capabilities
- Simple and cost-effective pricing structure



### a) **Apple Technology – The most advanced service and dispatch technology of any air filter service company in the country.**

FilterPro USA has equipped each of its technicians with an iPad and a state of the art and proprietary HVACR software program. No other filter service company has this extensive and detailed level of technology and operating process, which provides our technicians with detailed unit and filter information and customers with unprecedented levels of transparency! This technology provides customers with Service Reports. No longer do customers have to wait for paperwork, phone calls or faxes. Everything is entered from the rooftop and immediately available to the customer via the internet.

With iPad technology, customers know the exact time in & time out, the exact work performed, and labor and materials used – photos and attachments can be uploaded in real time and all

activity is GPS-monitored at the corporate office. The final work tickets are then reviewed and electronically signed on-site by a site manager. Our techs receive immediate feedback for their quality of work from on-site managers before leaving the site. All services receive a digital signature from the on-site manager and an indication of satisfactory or unsatisfactory work. Any instances of unsatisfactory work as indicated by the on-site manager during the sign-off process is investigated immediately by the service management team. Along with our devices, all company vehicles are GPS tracked. The FilterPro dispatch team routinely ensures GPS activity from the vehicles match GPS activity from technician devices, which adds yet another layer of accountability. All WOs are managed from within the proprietary ERP system to ensure all Work Orders (GCPS sites) are clocked into, serviced, and completed in the appropriate time frame.

## **b) *REPORT TRAC* Inspection/Service Reports**

FilterPro USA has taken the initiative to become a business that utilizes technology to better service its customers. Each one of our technicians is equipped with an iPad. We use these devices to send real-time information and to enable our service technicians to see exactly what filters need to be replaced and in what unit. Further, our operating system at the corporate office is tied to this mobile platform to direct the service technician to the sites that need to be completed. This allows our technicians to be routed and dispatched effectively and flexibly. This is important to our customers because we can be sure we don't miss a site or unit that needs clean filters.

Our investment in the best technology has taken our inspection/service reports from physical slips of paper to digital reports. After each completed service, a service report can be automatically emailed to a recipient(s) chosen by the customer. This report will show filters that are replaced at each unit, the name and address of the site, the name of technician, the date of the service, how much time was required on-site, and the signature of manager signoff when the service was completed. Most importantly, the technician can write notes for the recipient to view. After each service is completed and the technician has removed all old filters and replaced with new, clean filters a service report is generated and sent to the customer recipient with details on service information such as filter sizes, quantities, date, technician name, etc.

If an issue is found such as a broken door, broken belt, frozen coil, trash on roof, fouled motor, leaking refrigerant, etc. the technician fills out the Issues section of his Work Order detailing the issues discovered. At the completion of the Work Order, along with the service report, a separate issues report is generated and sent to the customer recipient. See Appendix A for example.

## 7. SETTING THE STANDARD

Our company differentiates itself by providing:

- Large, 100% self-performing footprint
- Fair wages for our technicians (Standard AND OT hours)
- Granular Reporting Capabilities
- Privately Owned, Minority Certified Business
- Purchasing Power with a Mom & Pop Local Feel
- Progressive business structure with world-class culture
- Transparency That Promotes Accountability
- Consistent, Reliable Services with Professional employees



## 8. BASIC COMPANY DATA

Legal Name: Filter Pro USA, LLC

Federal ID #: 47-1180523

Remit To Address: 4510 Helton Drive  
Florence, AL 35630

Service #: 1-833-274-5688

Service Email 24/7/365: ops@filterpro.com

Company Website: <http://www.filterpro.com>

## **9. THE PLAN FOR GWINNETT COUNTY PUBLIC SCHOOLS – METHODOLOGY/OPERATIONS**

*FilterPro USA creates filter change-out plans that meet the criteria within the customer's contract guidelines as well as the EPA's "Creating Healthy Indoor Air Quality in Schools" program (<https://www.epa.gov/iaq-schools>). The main objective of this initiative is to "Promote a healthy learning environment at your school to reduce absenteeism, improve test scores and enhance student and staff productivity." A scheduled preventative maintenance program that includes filter change-outs will provide higher quality air for all stakeholders at Gwinnett County Public Schools and will increase energy efficiency while reducing energy costs by ensuring ample air flow, cleaner coils and cleaner air ducts. Dirty coils are one of the most common issues that cause HVAC units to overwork and use more power than anticipated; more power = more \$.*

### **a.) The Materials**

We provide a full line of filtration products. In the application for Gwinnett County Public Schools, per customer specifications, FilterPro will install various air filters that meet Ashrae 52.2 requirements for particulate rating and allergens. FilterPro has manufacturing capabilities to directly source a majority of the polyester and pleated air filters needed in this contract. Outside of our manufacturing capabilities, we are a preferred purchaser/distributor of various filters including Ring Panel filters, Pocket filters (bag), Minipleat filters, Ashrae Cell high efficiency filters and Paint booth filters with filter manufacturing companies across the U.S. We also have the ability to manufacture Galvanized Mesh Fresh Air Filters, Galvanized Steel Retainer Frames for throwaway polyester pad air filters, Polyester Cannister Filter applications, and High-Lofted Polyester Pad Air Filters, most of which are currently in use at Gwinnett County Public Schools!

There are many filter types that we do not manufacture, including various custom pleat filters, Minipleat filters, Cell filters, HEPA filters, RigiPack Filters, VariCell Filters, Panel Filters, Gas-Phase filters, Bag-Type Filters, and BioMed filters. All these filter types are used on a daily basis by our service teams, and we have built excellent supply channels for these products.

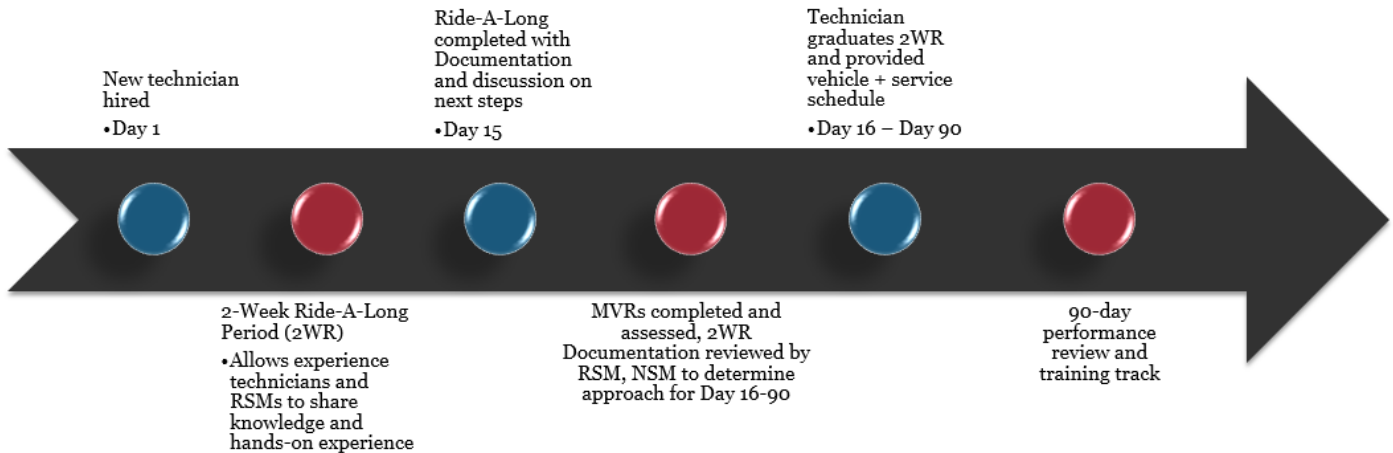
We handle all phases of the supply chain for all products. Materials are never stored at a customer site unless it is the customers' request. The customer should only see a filter if it is inside a unit or in the trash!

### **b.) The Technicians**

The technician is the most important person in our business. He/She is the hands and feet of our operation, and we understand the impact of a great filter tech!

All technicians are W-2 technicians. We wear standard, clean uniforms and drive company trucks/vans that are presentable and clearly marked. Unlike our major competitors, we pay a fair wage for standard hours AND overtime hours. We feel it is more important to get the job done completely and correctly than to encourage hasty and rushed work.

FilterPro technicians are trained over a 2-week introductory period where a new technician will perform a “ride-a-long” with an experienced technician or regional manager. Our technicians are trained based on guidelines set forth in the NAFA Certified Technicians handbook and also based on safety and best-practice guidelines prepared by FilterPro management. FilterPro trainers not only focus on best practices and requirements, but also focus on customer specific details for each site. Tasks such as dating each filter, ensuring doors are closed properly, and cleaning up screws or trash left behind are never considered “common sense” – all tasks required to complete the job the right way is trained, discussed, retrained and tested. See training flow example below.



Along with training related to filter specifications, service Do’s and Don’ts, and in-depth HVAC mechanical operations, our technicians are trained to follow a standard operating procedure built into the proprietary service management software utilized with iPads. By following a step-by-step procedure, we can provide a greater level of accountability and assurance that each task is completed as needed for the customer and documentation is obtained that may be relevant to the customer and FilterPro alike.

One important example is the checkout procedure within each Work Order. When a technician has completed the service for a site, there is a series of steps that has the customer sign the Work Order on the iPad screen and note whether he/she is satisfied with the work. Next, the technician is prompted to note safety details for the site and can notify Human Resources immediately if he/she suffered an injury of any kind. We encourage our technicians to report even the slightest injury to ensure documentation is obtained and treatment can be arranged as soon as possible. If an injury occurs that needs immediate attention, our technicians contact the HR Manager directly to arrange next steps and to ensure paperwork required to administer treatment is started quickly. The HR Manager then reaches out to the RSM (Regional Service Manager) and NSM (National Service Manager). See actual snippet below of part of our checkout procedures.

**Attachments:**  
No files have been attached to this Work Ticket yet.  
[Attach from my Ipad](#)

---

**(Required)**  
Were you injured on the job? Yes  No

End of Day Mileage  End Time

[End Day](#)

Technicians are always informed on up-to-date information such as site details, changes in service schedules, filter requirements, and new units. We made a significant investment to ensure the iPad cellular connection – which feeds this data – is backed by the most proven cellular company and is extremely reliable at virtually all locations nationwide. No other company provides their techs with the technology and simplicity that we do, which is a major advantage!

### **c.) Scheduling**

Based on the bid specifications, FilterPro will perform filter changes 4 times per year for all prefiltration and 1 time per year for annual/final filtration. As mentioned in “The Materials” section, FilterPro will only install materials that meet or exceed the scope of work in the RFP specifications.

*For the demands of Gwinnett County Public Schools, we employ full-time technicians who dedicate 100% of their work time towards this account. These technicians are assisted and supervised by our Georgia Regional Manager, Service Operations Manager and Certified Air Filter Specialist. Each have over 15 years’ experience in the filter industry and have passed industry examinations that test filter product and installation knowledge as well as overall HVAC mechanical knowledge. We are currently staffed to perform complete services to Gwinnett County Public Schools which will result in zero service gaps with a new contract!*

*Our operating procedures utilize a service dispatch method, which means our technicians and regional managers can focus on what is most important: the customer’s IAQ. FilterPro employs multiple full-time Dispatchers at the corporate office who set the service schedules and communicate with our customers to ensure the greatest level of service compliance is maintained. The Dispatch Teams routinely reach out to customer contacts before scheduling services to ensure we are informed of testing periods, renovations, maintenance (e.g. waxing floors), school holidays, etc. The dispatch team will set service schedules at least two weeks in advance for each of the service teams that will service Gwinnett County Public Schools.*

*Technicians will always arrive onsite with appropriate uniforms and badges, perform the work to remove and replace air filters\*, and will receive a customer representative’s signature at the end of each service.*

*\*Our technicians must “sign off” on every filter replaced at every unit programmed into our service management software. We do not carry around papers with old information that was printed off weeks ago, we utilize the iPad software to communicate live, updated information to our technicians performing IAQ services. Further, our technicians can adjust and change/place orders for new materials directly from the iPad.*

*Once a service is completed an automatic/digital service report can be sent to a customer recipient (maintenance director, work order specialist, etc.) notifying them of a completed service. The service ticket has information such as filters replaced, the technicians onsite, and*

*any notes left by the technician that the customer representative may need to know (iced units, broken belts, unit shutoff, etc.)*

#### **d.) Filter Records and Unit Change-Outs**

Up-to-date unit and filter records are kept for all sites under contract. All information is maintained digitally by our field staff and Data Management team staffed at the corporate office. You can be confident that we have updated filter records to ensure we provide 100% of the materials your site needs for each service.

Further, our technicians can update information and request specialty materials directly from the iPads in real-time. This means that when a new unit is added or a renovation is taking place, our technicians can update our database during a routine service and have the correct materials manufactured/supplied without interruption. This is a significant benefit to your team. This is a great example of how this service is turn-key!

#### **e.) Quality Control**

The quality of our products and the products of our suppliers are constantly tested. Amy, our plant manager, personally inspects and signs off on all materials manufactured by FilterPro. All materials distributed through our supply channels are regularly tested to ensure proper efficiencies and effectiveness. We obtain and review these test reports on a regular basis and are happy to provide those reports to our customers.

The quality of our service is maintained by a strict training regiment, routine follow-up checks by our service managers and the capabilities of our operating platform. Technician activity is GPS tracked, which provides our customers with transparency that we are providing the services we promise to provide.

#### **f.) Dedicated Account Management**

Gwinnett County Public Schools will benefit from a single point of contact for all inquiries. The GA Regional and Service Operations Manager are extremely hands-on with our daily operations. Both contacts can help solve any issue you may have. We can provide either of these individuals as your point of contact.

It is a standard operating procedure for our Regional Managers to reach out to our customers on a biweekly basis to ensure effective communication and to allow the flow of ideas and suggestions to remain current. This proactive approach is yet another example of our transparent service culture.

## **Brief Organizational Chart**

### **Service Operations Manager – Brian Pearson**

- 22 years' experience in Service maintenance and Filtration industry.
- 12 years in Service management and HSE management
- *NAFA Certified Air Filtration Specialist, NCT I, and NCT II*
- Specialize in Schools, Hospitals, and industrial filtration.



### **Regional Service Manager – Colly Weed**

- 10 years' experience in the filter industry all in Georgia.
- *8 years in Maintenance at a GA school system*
- Worked with numerous school systems throughout Georgia as well many industrial and government type accounts.

### **Quality Control – Erich Hamann**

- Over 20 years' experience in air filtration and is a *NAFA Certified Air Filter Specialist and NAFA Certified Technician*. Background in HVAC PM Service Management.
- Previously worked hand-in-hand with school systems as GA Regional Manager before being promoted as a valuable asset to assist nationwide.



### **Service Operations Support – Kori Larsen**

- Works closely with the Service Operations and Region Managers
- Over Dispatch team who maintain schedules and help technicians out in the field.
- *NAFA National Certified Technician and Military veteran.*

## **g.) Cost/Benefit**

The benefits of a FilterPro Air Filter Change-Out program far outweigh the costs. Simply put, the benefits are numerous:

- Improved IAQ conditions for students, teachers, employees
- Protection against infectious diseases and bacteria
- Protection against IAQ inquiries
- Improved HVAC efficiency which saves money
- Reduction in labor costs
- Frequent HVAC unit inspections – FP Filter Techs perform routine inspections at each filter change
- Courtesy notifications from field teams concerning unit conditions (e.g., ice on coils, leaking hoses, broken belts, broken doors)
- Emergency response times need to remediate serious issues
- Less hassle and worry for site maintenance teams

The National Air Filtration Association recommends a scheduled air filter service program for all filter locations at commercial sites. With this program, Gwinnett County Public Schools would fulfill the recommendations from the EPA's *Tools for Schools* IAQ initiative and NAFA.

## **h.) Additional Services**

Beyond our core filter business, we can provide other HVAC materials and services including:

- HVAC Condenser Coil Cleaning
- Grille Vacuuming
- Drip Pan Cleaners
- Drip Pan Repair
- HVAC Duct Cleaning
- Specialty bag in bag out Hepa
- Developing Facility IAQ plans
- IAQ Consulting

Thank you for allowing us to chance to continue our partnership with Gwinnett County Schools. Our service team is dedicated and loaded with experience in IAQ and PM Maintenance. We strive to be a great partner, preform great service and be there to help with all IAQ needs. If you would like more information on our additional services or have any questions, please reach out to me.

Thank you  
Brian Pearson  
Service Operations Manager  
833-274-5688  
bpearson@filterpro.com