1.1 BUYERS AGENT — SOLAR TRANSACTION CHECKLIST

For Representing Buyers Purchasing Homes with Solar
Usethischecklistoneverysolarhomepurchasetoprotect buyers, reduce risk, and ensure a clean solar transfer.

PHASE 1 — PRE-OFFER DISCOVERY

Step 1: Identify Solar Impact on the Buyer

- ☐ Review Solar Listing Report (if available) and assess buyer benefit
- ☐ Confirm solar ownership method
  - ○ Owned outright
  - ○ Owned with loan
  - ○ Lease / PPA
  - ○ Utility-owned
- ☐ Clarify seller's transfer intent (payoff, assumption, buyout, etc.)
  - ○ Confirm remaining financing term (if applicable)
  - ○ Confirm whether monthly payments will transfer
- ☐ Structure the offer with solar obligations in mind

PHASE 2 — SOLAR DUE DILIGENCE

Step 1: Collect Solar Documentation

- ☐ Solar Reports (if available)
  - ○ Solar Listing Report
  - ○ Solar Inspection Report
  - ○ Solar Appraisal Report
- ☐ Solar Documents
  - ○ Solar loan / lease / PPA agreement (if applicable)
  - ○ Solar installation agreement
  - ○ Utility net metering / interconnection agreement
- ☐ Provide Buyer Solar Transfer Checklist (based on ownership type)

Step 2: Order Buyer Solar Reports

- ☐ Solar Inspection Report
- ☐ Home Energy Report
- ☐ Solar Appraisal Report (if owned solar will transfer)
- ☐ Upload all obtained solar documents when ordering

Step 3: Confirm Solar Claims

- ☐ Confirm solar ownership and financing terms (if applicable)
  - ○ Buyout / payoff amount
  - ○ Remaining financing term
  - ○ Monthly solar payment
- ☐ Confirm solar equipment health
  - ○ Energy production
  - ○ Remaining life
  - ○ Condition / issues
- ☐ Identify required repairs or warranty items
- ☐ Confirm installer warranty status and business standing
- ☐ Address any misrepresentation through renegotiation or credits

PHASE 3 — COORDINATE SOLAR TRANSFER

Step 1: Buyer Initiates Solar Transfer

- ☐ Ensure buyer contacts loan / lease / PPA provider (if applicable) to:
  - Qualify for transfer
  - Initiate transfer
  - Provide payment method
- ☐ Notify escrow of payoff / transfer intent and responsibilities
- ☐ Ensure required transfer or lien release fees are paid

Step 2: Coordinate With Buyer's Lender

- ☐ Disclose if solar has ongoing monthly payments
- ☐ Provide payoff / buyout information (if applicable)
- ☐ Confirm whether solar impacts mortgage qualification
- ☐ Evaluate whether adding solar buyout to the mortgage improves DTI (if applicable)

Step 3: Support Appraisal

- ☐ Provide Solar Appraisal Report (if available)
- ☐ Provide Solar Listing Report (if available)
- ☐ Clarify whether solar will convey with a loan / lease or owned outright
- ☐ Review appraisal for proper solar treatment
- ☐ Provide supplemental documentation if needed

PHASE 4 — SOLAR & CLOSE OF ESCROW

Step 1: Confirm Solar Transfer Progress

- ☐ Confirm repairs / warranty items are resolved or scheduled
- ☐ Confirm prepayment / assumption / buyout instructions with escrow
- ☐ Confirm UCC release or transfer has been initiated

Step 2: Confirm Utility & Net Metering Continuity

- ☐ Coordinate utility account transfer
- ☐ Confirm net metering transfer (if applicable)
- ☐ Ensure buyer understands any required utility actions

Step 3: Confirm Transfer Completion

- ☐ Solar ownership transferred as agreed
- ☐ UCC / lien properly released or reassigned
- ☐ Monitoring access instructions received

Step 4: Prepare Buyer for Ongoing Solar Home Ownership

- ☐ Utility net metering transferred to buyer
- ☐ Buyer understands net metering billing cycle
- ☐ Buyer understands ongoing solar payment obligations (if
- ☐ any) Buyer knows solar service providers
- ☐ Buyer stores all solar documentation
- ☐ Buyer Solar Transfer Checklist completed