



For Listing Homes with Solar

Use this checklist on every solar listing to control the transaction, protect seller equity, and prevent surprises.

PHASE 1 — LISTING APPOINTMENT

Step 1: Set Solar Expectations

- Explain that solar is an asset when handled correctly
- Explain that preparation strengthens negotiation
- Position yourself as an agent who follows a defined solar process
- Clarify how ownership structure impacts how the home is sold

Step 2: Conduct Solar Discovery

- Confirm how the system is owned
 - Owned outright
 - Owned with loan
 - Lease / PPA
 - Utility-owned
- Confirm whether there are monthly payments
- Identify installer and loan / lease / PPA provider
- Provide Solar Transfer Checklist (based on ownership type)
- Provide Homeowner Guide: How to Find Solar Documents

Step 3: Initiate Solar Transfer

- Instruct seller to begin transfer steps immediately
- Review the Solar Transfer Checklist for clarity
- Schedule a follow-up to review documents and reports

PHASE 2 — PRE-LISTING PREPARATION

Step 1: Order Solar Reports

- Upload available solar documents when ordering
 - Solar Listing Report
 - Solar Inspection Report
 - Solar Appraisal Report

Step 2: Review Reports With Seller

- Confirm ownership and financing details
- Review inspection findings
- Identify repair or warranty needs
- Decide transfer pathway (assumption, payoff, buyout, etc.)

Step 3: Finalize Solar Strategy

- Confirm transfer steps have begun
- Confirm payoff or assumption direction
- Finalize pricing strategy and equity impact
- Use solar documents and the Listing Report to complete required state solar disclosures





PHASE 3 — LISTING & MARKETING

Step 1: Market With Transparency

- Use the Listing Report to write the solar portion of the home description
- Attach or link the Listing Report in MLS
- Attach required state solar disclosures in MLS
- Provide printed Solar Reports for showings and open houses

Sample Solar Description for Listing

Home includes 6-year-old 8.9kW owned solar with a 25-year warranty, saving approx. \$260/mo & estimated to save \$34K+ over 10 yrs.

Step 2: Assist Potential Buyers With Solar

- Encourage buyers to personalize the Interactive Solar Listing Report
- Direct buyers to review solar documents in MLS

PHASE 4 — ESCROW COORDINATION

Step 1: Buyer & Agent Coordination

- Provide complete solar documentation
- Provide Buyer Solar Transfer Checklist
- Answer solar questions using Solar Reports

Step 2: Escrow Coordination

- Provide solar documentation to escrow
- Clarify solar payoff and transfer responsibilities with escrow
- Confirm payoff / assumption timeline
- Confirm UCC filing release is being handled

Step 3: Address Contingencies

- Resolve inspection-period equipment issues
 - Solar repairs
 - Warranty claims
- Navigate solar-related credits or concessions

Step 4: Appraisal Support

- Provide solar documentation to the appraiser
- Ensure solar ownership is clearly understood
- Review appraisal for proper solar consideration
- Provide supplemental documentation if needed

PHASE 5 — CLOSE OF ESCROW

Step 1: Confirm Transfer Completion

- Solar payoff / assumption / buyout completed
- Utility net metering transfer completed
- Monitoring access instructions provided
- UCC / lien released from seller

Step 2: Close the Seller Relationship

- Confirm all solar transfer steps are completed
- Reinforce value delivered through a structured solar process

