

DC Capital Law – Solar

REQUIRED DOCUMENTS & RETRIEVAL INSTRUCTIONS

Quick-Reference Retrieval Guide | Verified 2026-05-14

Name:		Date:	
Signature:		Phone:	

This document covers the actions you need to take to obtain the documents if they are not in your possession. For the document retrieval instructions - see the pages following the Acknowledgement section.

ACKNOWLEDGEMENT:

Please find below the list of required documents. These documents are essential for the attorney to evaluate your matter. For each document, check the appropriate box. If you were unable to obtain a document, briefly describe the obstacle.

Solar Contract: power purchase agreement, solar lease, or solar loan/retail installment contract.

- ☐ I have these documents and am Submitting them to solar-exit company
- ☐ I requested these documents and expect to get them on (fill-in date):_____ and return at that time
- ☐ If you were unable to obtain this document - Please provide brief explanation:

Finance agreement.

- ☐ I have these documents and am Submitting them to solar-exit company
- ☐ I requested these documents and expect to get them on (fill-in date):_____ and return at that time
- ☐ If you were unable to obtain this document - Please provide brief explanation:

Any UCC-1 fixture/lien filing.

- ☐ I have these documents and am Submitting them to solar-exit company
- ☐ I requested these documents and expect to get them on (fill-in date):_____ and return at that time
- ☐ If you were unable to obtain this document - Please provide brief explanation:

Home ownership documents-ie. title, mortgage docs, etc.

- ☐ I have these documents and am Submitting them to solar-exit company
- ☐ I requested these documents and expect to get them on (fill-in date):_____ and return at that time
- ☐ If you were unable to obtain this document - Please provide brief explanation:

Six months of electric bills pre-solar and one year of electric bills/usage and metering reports post-solar

- ☐ I have these documents and am Submitting them to solar-exit company
- ☐ I requested these documents and expect to get them on (fill-in date):_____ and return at that time

- ☐ If you were unable to obtain this document - Please provide brief explanation:

Six months to One year of solar metering/production reports.

- ☐ I have these documents and am Submitting them to solar-exit company
- ☐ I requested these documents and expect to get them on (fill-in date): _____ and return at that time
- ☐ If you were unable to obtain this document - Please provide brief explanation:

Utility interconnection agreement.

- ☐ I have these documents and am Submitting them to solar-exit company
- ☐ I requested these documents and expect to get them on (fill-in date): _____ and return at that time
- ☐ If you were unable to obtain this document - Please provide brief explanation:

County installation permitting records approving solar installation

- ☐ I have these documents and am Submitting them to solar-exit company
- ☐ I requested these documents and expect to get them on (fill-in date): _____ and return at that time
- ☐ If you were unable to obtain this document - Please provide brief explanation:

RETRIEVAL INSTRUCTIONS — How to Obtain Each Required Document

1	Solar Agreement — PPA, Lease, or Loan	LOAN / PPA-LEASE
1	Check the client's email inbox — search for installer name, lender name, "loan," "lease," "PPA," "DocuSign," "Adobe Sign."	
2	Check client's borrower portal (sign in with email used at signing): loans.sunlightfinancial.com / loanpal.mymortgage-online.com / solarservicing.myaccountinfo.com / my.sunrun.com / sunstrongmanagement.com , etc.	
3	Call the lender or PPA/lease owner directly (three-way call: you + client + counterparty). Identity verified on the call; documents released to email of record. Common numbers: Sunlight (877) 536-0661 GoodLeap (844) 562-6725 Mosaic/Solar Servicing (866) 493-6367 Dividend Finance (844) 805-7100 Sunrun (855) 478-6786 SunStrong (833) 514-1858 Spruce Power (888) 636-0336.	
4	Try the e-sign platform archive — client logs in with email used at signing: DocuSign (docusign.com) · Adobe Sign (acrobat.adobe.com/sign) · Dropbox Sign (sign.dropbox.com).	
5	If lender/owner is bankrupt: search the claims agent case page (Stretto: cases.stretto.com · Kroll: cases.ra.kroll.com · Epiq: dm.epiq11.com). Known: Lumio → Stretto · SunPower → Epiq · Mosaic → Kroll. Free docket also at CourtListener/RECAP: courtlistener.com/recap .	
6	For PPA/Lease portfolio transfers: Vivint Solar → Sunrun (2020) · SunPower Lease/PPA → SunStrong (2024-25) · NRG Home Solar → Sunrun successor flows. Check monthly bill payee to confirm current owner.	

2	Finance Agreement (if separate from solar agreement)	LOAN
1	Search client's credit report for installment loan line item — lender name appears there.	
2	Check bank statement payee on monthly solar debit — payee = servicer of record.	
3	Call the servicer (same steps as 1A above). If the servicer has changed, check the lender's website for a posted notice naming the buyer or new servicer.	
4	Pull UCC-1 fixture filing from county land records (search "[county] [state] recorder") or state SOS UCC index (NASS directory: nass.org/business-services/ucc-filings). The finance agreement is often filed as a UCC-1.	

3	UCC-1 Fixture Filing	LIEN RECORD
1	Search county land records by property address or client name: find the portal at "[county] [state] recorder" or use NACo County Explorer (ce.naco.org). FL examples: myorangeclerk.com · brevardclerk.us . CA examples: lavote.gov · riversideacr.com . TX: cclerk.hctx.net .	
2	Search state Secretary of State UCC index by debtor name: FL: floridaucc.com · CA: bizfileonline.sos.ca.gov · NY: ucc-efiling.dos.ny.gov · NJ: njportal.com/ucc · NASS national directory: nass.org/business-services/ucc-filings .	
3	Call the lender or PPA owner — they filed the UCC-1 and can confirm the filing number and county of record.	
4	Tesla California note: Tesla also files a Notice of Independent Solar Energy Producer Contract (CPUC requirement) — separate from the UCC-1. Both may need to be addressed in a sale or refinance.	

4	Home Ownership Documents	OWNERSHIP
1	Request from client: recorded deed, current property tax bill (full version), most recent mortgage statement, most recent title insurance policy, homeowner's insurance declarations page, HOA documents if applicable.	
2	Pull recorded deed from county recorder portal (same portals as UCC-1 above — search by address or grantor/grantee name).	
3	Tax bill: FL (all 67 counties): floridatxcollectors.com · CA: search "[county] california tax collector" · TX: search "[county] county tax assessor texas."	
4	If a client bought the home AFTER solar was installed, the closing/title file usually contains the PPA/lease estoppel and assumption documents. Contact the title or escrow company that handled the purchase.	
5	If home is mortgaged, the mortgage lender retained the PPA/lease estoppel at underwriting. Call the lender's customer-service line.	

5	Electric Bills — Pre- and Post-Solar Covers: 6 months pre-solar utility bills · 12 months post-solar utility bills/usage and metering reports	UTILITY RECORDS
1	Request from client: physical copies or online account history. Most utilities provide 12–24 months of bill history in the online portal.	
2	Request directly from the utility — client calls or logs into the utility's online account and downloads billing history. Major utility portals: FPL (fpl.com) · Duke Energy (duke-energy.com) · TECO (tampaelectric.com) · PG&E (pge.com) · SCE (sce.com) · SDG&E (sdge.com) · Con Edison (coned.com) · APS (aps.com) · SRP (srpnet.com) · NV Energy (nvenergy.com).	
3	For post-solar metering/usage data, request the production meter installation date and monthly net metering statements from the utility's solar or interconnection department.	

6	Solar Production Reports	PRODUCTION DATA
1	Request from the PPA/lease owner or lender borrower portal — system owners (Sunrun, SunStrong, Spruce, Tesla) maintain monitoring portals showing monthly production. Log in or call.	
2	Requests from the inverter monitoring platform — Enphase (enlighten.enphaseenergy.com), SolarEdge (monitoring.solaredge.com), SMA, or other manufacturer platforms store production data independently of the installer.	
3	Request from the utility interconnection/net metering account — the utility's production meter records are available from the utility's solar department (same contacts as Doc 4 above).	
4	Request from the installer or successor installer if still operating (see Section F of SOP for installer contacts and successors).	

7	Utility Interconnection Agreement & PTO	INTERCONNECTION
1	Call the installer first (if still operating) — interconnection paperwork is part of the standard installation file. Request the executed interconnection agreement and Permission-to-Operate (PTO) letter.	
2	Contact the utility's solar / interconnection department directly — the utility holds the executed interconnection agreement, inverter specs, production-meter installation date, and PTO date. Use the same utility contacts listed in Doc 4.	
3	Check the AHJ (building department) permit file — interconnection records are often included in or cross-referenced by the permit set. Search by address at "[city/county] building department permits" portal.	
4	If the installer is bankrupt: contact the trustee or claims agent (see Doc 1 bankruptcy steps above). The lender or PPA/lease owner also required a copy of the interconnection records at funding/execution.	

8	AHJ Building Permit & Inspection Records	PERMIT
1	Find the AHJ (Authority Having Jurisdiction): search "[city or county] building department" or "[city or county] permits." Every solar installation has a permit on file — it is a public record.	
2	Search the AHJ's online portal by property address or permit number. The permit file typically contains: system design, panel and inverter specs, system size in kW, installer's contractor license number, issuance date, and final inspection date.	
3	No online record: file a written public-records request with the AHJ's records custodian (citing your state's public-records law).	
4	Installer license verification: if the installer is defunct, look up the license number from the permit to pull disciplinary history or RMO contact. FL (DBPR): myfloridalicense.com · CA (CSLB): csלב.ca.gov · TX (TDLR): tdlr.texas.gov · AZ (ROC): roc.az.gov · NJ: njconsumeraffairs.gov/elec · NV: nscb.nv.gov.	