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Solar Transfer Checklist

For real estate transactions involving Photovoltaic (PV) / solar energy systems.

Property address	MLS #	Date	Preparer
Seller	Buyer	Realtor	

1 - OWNERSHIP and TITLE – Determine who legally owns the equipment

☐ Confirm ownership type	Owned outright, financed with a solar loan, or leased.	
☐ Request the original installation contract	Identifies the installer, the equipment, system size, installation date and ownership terms.	
☐ Check title for a UCC-1 fixture filing statement	Leased systems often carry a UCC-1 fixture filing. If it shows in a title search it may have to be dealt with before closing.	
☐ Confirm whether the system transfers with the deed	Owned and financed systems are fixtures and convey. Leased systems remain the provider's property.	

2 – SYSTEM INFORMATION – Physical and operational status of the equipment

☐ Confirm the installation date	From the original permit or contract. Age affects both the value estimate and warranty coverage.	
☐ Identify the inverter brand, model, and age	Inverters typically last 10–15 years and are the most commonly replaced component.	
☐ Confirm inverter warranty status	Most carry 10–25 years. Confirm the remaining term and whether it transfers.	
☐ Check panel brand and condition	Note any visible damage, discoloration or cracking.	
☐ Verify panel warranty status	Typically a 25-year performance warranty and a 10–12-year product warranty. Confirm transfer to the new owner.	
☐ Inspect racking and mounting hardware	Rust, loose fasteners, roof penetration issues.	
☐ Note any prior repairs or replacements	Ask whether panels, inverters or components have been replaced, and request the documentation.	

3 – PERMITS & INTERCONNECTION – Legal compliance and utility connection status

☐ Confirm the building permit was pulled and finalized	An open or missing permit can block close of escrow, and an unpermitted system is a material defect that must be disclosed.	
☐ Confirm Utility Permission to Operate (PTO) was issued	The utility issues a PTO letter when the system is approved to operate. No PTO means it should not be operating.	

4 – UTILITY ACCOUNT – Utility billing plan

☐ Identify the current utility rate plan	The utility plan determines how the buyer will be billed	
☐ Request the last 12 months of utility bills	They show actual credits, net billing and amounts owed, and reveal whether the system is performing.	
☐ Identify RCP Rate	Contact utility and determine current RCP rate and what the rate will be after the transfer is complete.	

5 – LEASE CONTRACT – If applicable

☐ Obtain a full copy of the lease agreement	Monthly payment, escalation rate, remaining term, buyout options and assumption requirements.	
☐ Note the monthly payment and the annual escalator	Most leases have a fixed monthly payment for a set term. Some leases escalate 0.99%–3.99% per year.	
☐ Confirm the buyout option and its current amount	Many leases allow a buyout. Request a current quote from the provider.	
☐ Start the assumption process early in escrow	The buyer has to be approved, which commonly takes weeks. If they do not qualify the seller may have to buy the lease out at closing.	

6 – MONITORING & PRODUCTION – Verify the system is producing as expected

☐ Confirm monitoring is available, active, and transferrable	Active monitoring makes real-time and historical production verifiable by the owner and provider. Transfer monitoring upon closing.	
☐ Request 12 months of production data	Compare actual output against what the system size should produce.	
☐ Check for active alerts or error notifications	Unresolved alerts should be investigated before closing.	

7 – RECOMMENDED NEXT STEPS – Determine who legally owns the equipment

☐ Schedule a Solar Inspection Report	Visit https://www.telesissolar.com/inspections to schedule Inspection	
☐ Contact providers	Contact the Lessor or Financier early in the process to find out their specific transfer steps.	
☐ Disclose all known solar information to the buyer	Disclose material facts such as ownership type, lease obligations, permit status and known defects.	