DC CAPITAL LAW — SOLAR

Required Documents & Retrieval Instructions

Thank you for retaining DC Capital Law in connection with your client's solar matter. This guide sets out the documents your client should gather in advance of their initial consultation, together with instructions for obtaining any documents not currently in their possession. Completing this checklist before submitting the file allows our office to review it efficiently and move directly into scheduling.

Please note that legal advice concerning the merits of a client's case, the likelihood of a particular outcome, or the interpretation of a specific contract may be provided only by a DC Capital Law attorney. If a client raises case-specific questions, please advise them that these matters will be addressed during the initial consultation.

Name: ____ **Date:** ________________________

Signature: ________________________________ **Phone:** ________________________

Acknowledgement

Please find below the list of documents required for your client's initial consultation. For each document, check the appropriate box. If a document could not be obtained, briefly describe the obstacle in the space provided.

1. Loan Contract

- ☐ I have this document and am submitting it with this file.
- ☐ I have requested this document and expect to receive it on (date): _______________
- ☐ I was unable to obtain this document. Please provide brief explanation:

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2. Solar Installation / Solar Contract (sometimes it's a Power Purchase Agreement or Solar Lease)

- ☐ I have these documents and am submitting them with this file.
- ☐ I have requested these documents and expect to receive them on (date): _______________
- ☐ I was unable to obtain these documents. Please provide brief explanation:

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3. Electric Bills — Six (6) Months Pre-Solar and Twelve (12) Months Post-Solar (full bills, all pages — no screenshots)

- ☐ I have these documents and am submitting them with this file.
- ☐ I have requested these documents and expect to receive them on (date): _______________
- ☐ I was unable to obtain these documents. Please provide brief explanation:

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4. UCC-1 Fixture / Lien Filing (if applicable)

- ☐ I have these documents and am submitting them with this file.
- ☐ I have requested these documents and expect to receive them on (date): _______________
- ☐ I was unable to obtain these documents. Please provide brief explanation:

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5. Six (6) Months of Loan Statements / Payments

- ☐ I have this document and am submitting it with this file.
- ☐ I have requested this document and expect to receive it on (date): _______________
- ☐ I was unable to obtain this document. Please provide brief explanation:

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6. Twelve (12) Months of Solar Production Data (from solar app)

- ☐ I have this document and am submitting it with this file.
- ☐ I have requested this document and expect to receive it on (date): _______________
- ☐ I was unable to obtain this document. Please provide brief explanation:

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7. Permit Documents (if available)

- ☐ I have this document and am submitting it with this file.
- ☐ I have requested this document and expect to receive it on (date): _______________
- ☐ I was unable to obtain this document. Please provide brief explanation:

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8. Interconnection Agreement (if available)

- ☐ I have this document and am submitting it with this file.
- ☐ I have requested this document and expect to receive it on (date): _______________
- ☐ I was unable to obtain this document. Please provide brief explanation:

Additional Supporting Materials

In addition to the documents above, our office will also need copies of the following supporting materials:

- Solar sales presentations or proposals
- Emails or text messages related to the transaction
- Written materials left by the sales representative
- Photos of any related property damage
- Invoices for any related out-of-pocket expenses

These are not required for your client's initial consultation, and their absence will not delay scheduling. However, they are important to the overall handling of the matter, so if any are readily available, please include them with this submission now. Otherwise, please note that your client will be asked to provide them at a later stage of the process.

Retrieval Instructions — How to Obtain Each Document

If your client isn't sure which company holds their loan, lease, or PPA, check the monthly statement or the payee on their bank account. Lender contact information is verified current as of July 27, 2026.

1. Solar Agreement — Loan, PPA, or Lease Contract LOAN / PPA-LEASE

1. Search the client's email for the installer or lender name, or terms like "loan," "lease," "PPA," or "DocuSign."
2. Log into the lender's online portal, or call the lender directly (see contact list below).

3 If the installer is out of business, request the agreement from the lender instead.

2. Payment Statements PAYMENT STATEMENTS

1 Client downloads payment history from the lender's online portal, or calls the lender to request statements.

2 Confirm the correct servicer using the monthly bill payee, especially if the loan has been transferred (see notes below).

3. Electric Bills — Pre- and Post-Solar UTILITY RECORDS

1 Client calls the utility or logs into their online account to download full bills — not screenshots or summary pages.

2 If pre-solar bills aren't available, bank statements may show what the client was paying before installation.

4. UCC-1 Fixture / Lien Filing LIEN RECORD

1 Search county land records or the state Secretary of State's UCC index by the client's name or property address.

2 The lender or PPA owner can also confirm the filing number and county of record.

5. Solar Production Data PRODUCTION DATA

1 Client downloads production history from the solar monitoring app, or calls the installer/lender for access.

2 Data may also be available through the inverter manufacturer's platform (e.g., Enphase, SolarEdge).

6. Utility Interconnection Agreement & Permission to Operate (PTO) INTERCONNECTION

1 Check installer paperwork first, then contact the utility's interconnection department directly.

7. Permit Documents PERMIT

1 Check installer paperwork first, then search the county/city building department's online permit portal.

Lender & Servicer Contact List

Company	Type	Phone	Email	Website / Portal
GoodLeap	Loan	(844) 562-6725	customerservice@goodleap.com	goodleap.com / my.goodleap.com
Dividend Finance	Loan	(844) 805-7100	homeowners@dividendfinance.com	dividendfinance.com
Sunrun	PPA / Lease	(855) 478-6786	customercare@sunrun.com	sunrun.com / my.sunrun.com
Sunstrong Management	PPA / Lease Servicer	(833) 514-1858	info@sunstrongmanagement.com	sunstrongmanagement.com
Sunnova (see note)	PPA — servicer is SunStrong	(833) 514-1858	info@sunstrongmanagement.com	sunstrongmanagement.com
Service Finance Co.	Loan	(866) 254-0497	(use portal contact form)	svcfin.com / myloan.svcfin.com
Sunlight Financial	Loan	(888) 850-3359 opt. 2	support@sunlightfinancial.com	sunlightfinancial.com
Mosaic (see note)	Loan — servicer is Solar Servicing	(866) 493-6367	loanservicing@solarservicingllc.com	solarservicingllc.com
Spruce Power	PPA / Lease	(888) 636-0336	support@sprucepower.com	sprucepower.com
Tesla Energy	Loan / PPA	(877) 798-3752 opt. 4, 2	(use in-app support)	tesla.com/support/energy
Valoa Solar	Installer	(816) 857-2637	support@valoasolar.com	valoasolar.com
Palmetto	Solar Installer / Loan / PPA/Lease	(855) 339-1831	help@palmetto.com	palmetto.com

Notes: Sunnova ceased independent operations following its 2025 Chapter 11 sale; the contact information above for “Sunnova” is SunStrong Management’s, and clients with a Sunnova-originated account should contact SunStrong directly. Mosaic’s loan servicing was acquired by Solar Servicing LLC (a Forbright Bank subsidiary) following Mosaic’s own 2025 Chapter 11 case; the contact information above for “Mosaic” is Solar Servicing’s. In both cases, existing loan terms are unchanged — only the servicing contact has changed.

If a Company Is Out of Business

If the original installer is out of business, the client will need to request the applicable documents from their lender instead.