






Contractor Checklist

✔ Required documents & information for all projects

	Customer Information – Full name, address, email, phone number
	Utility Provider
	Data Release Form – Completed and signed* by the customer
	Proposal / Contract – Includes model number and customer signature*
	Heating Fuel Type – Current heating fuel type and if a conversion, what is new fuel type?
	Lender – Identify which lender has pre-approved customer’s Smart-E Loan
	Additional Financing Source (if needed) – Is customer using another loan in addition to Smart-E?
	Certificate of Completion** – Signed* by contractor and the homeowner listed on loan

✔ Required documents & information for specific project types

 Solar Projects
System Size (kW STC)
Incentive approval (where applicable)
Site plan
One-line diagram
Permission to operate**
 Energy Storage Projects
Permission to operate**

 HVAC & Plumbing Projects
AHRI Certificate or Spec Sheet
Permit or Municipal Inspection Report**
 Window Projects
Spec Sheet (must list U-Factor and SHGC for each proposed window)
Permit or signed final invoice**
 Insulation Projects
R-Value of proposed insulation
Permit or signed final invoice**

*Ink or eSign accepted, typed signatures not accepted

**Needed for project completion

Get started with a Smart-E Loan today at inclusiveprosperitycapital.org/products/smart-e-loan-program