

Covers residential and commercial solar PV and battery storage installers, including sales-and-install and install-only companies. Complete with ACORD 125, 126, and 130. Attach a sample customer contract and warranty.

## 1 APPLICANT / BUSINESS INFORMATION

|                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|
| LEGAL BUSINESS NAME  | DBA                  | FEIN                 | YEARS IN BUSINESS    |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| BUSINESS ADDRESS     | CITY / STATE / ZIP   | WEBSITE              |                      |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |                      |

**Entity type:**  
☐ Sole proprietor    ☐ Partnership    ☐ LLC    ☐ Corporation

|                         |                      |                      |
|-------------------------|----------------------|----------------------|
| PRIMARY CONTACT / TITLE | PHONE                | EMAIL                |
| <input type="text"/>    | <input type="text"/> | <input type="text"/> |

|                                           |                        |
|-------------------------------------------|------------------------|
| ELECTRICAL / SOLAR LICENSE NO(S) / STATES | NABCEP-CERTIFIED STAFF |
| <input type="text"/>                      | <input type="text"/>   |

## 2 OPERATIONS

| PERIOD               | DIRECT PAYROLL (\$)  | EMPLOYEES            | SUBCONTRACTOR COSTS (\$) | GROSS RECEIPTS (\$)  |
|----------------------|----------------------|----------------------|--------------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>     | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>     | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>     | <input type="text"/> |

Periods: next 12 months (estimated); prior 12 months; second prior year.

|                            |                      |                          |                      |
|----------------------------|----------------------|--------------------------|----------------------|
| SYSTEMS INSTALLED PER YEAR | RESIDENTIAL (%)      | WITH BATTERY STORAGE (%) | LEASE / PPA (%)      |
| <input type="text"/>       | <input type="text"/> | <input type="text"/>     | <input type="text"/> |

2-1 Does the applicant sell systems directly to homeowners (door-to-door, phone, or online)? ☐ Yes ☐ No  
 IF YES, EXPLAIN

2-2 Does the applicant install battery storage systems? ☐ Yes ☐ No  
 IF YES, EXPLAIN

2-3 Does the applicant use subcontracted install crews or sales dealers? ☐ Yes ☐ No  
 IF YES, EXPLAIN

2-4 Does the applicant perform roof repairs or re-roofing with installations? ☐ Yes ☐ No  
 IF YES, EXPLAIN

## 3 EXPOSURE & RISK QUESTIONS — ROOF WORK, FIRE & SALES PRACTICES

Solar installers work on roofs, where falls and leaks from penetrations drive claims, and install electrical and battery systems that can cause fires. The 30% homeowner tax credit ended for systems placed in service after 2025, raising the stakes on how systems are sold and on installers' ability to honor warranties.

3-1 Is fall protection used on every roof, with anchors installed before work begins? ☐ Yes ☐ No  
 IF YES, EXPLAIN

3-2 Are roof penetrations flashed and sealed to the racking and roofing manufacturers' specifications? ☐ Yes ☐ No  
 IF YES, EXPLAIN

3-3 Is the roof's condition and remaining life assessed and documented before installation? ☐ Yes ☐ No  
 IF YES, EXPLAIN

3-4 Are systems installed with NEC-compliant rapid shutdown? ☐ Yes ☐ No  
 IF YES, EXPLAIN

3-5 Are systems inspected (by the jurisdiction or utility) before energizing? ☐ Yes ☐ No  
 IF YES, EXPLAIN

- 3-6 If yes to 2-2, are batteries installed to NFPA 855 and manufacturer spacing and location requirements? ☐ Yes ☐ No  
IF YES, EXPLAIN
- 3-7 If yes to 2-1, are savings estimates and any tax-credit statements reviewed for accuracy before customers sign? ☐ Yes ☐ No  
IF YES, EXPLAIN
- 3-8 Do contracts clearly state that the federal homeowner credit ended for systems placed in service after 2025? ☐ Yes ☐ No  
IF YES, EXPLAIN
- 3-9 Has the applicant had a roof-leak, fire, or sales-practice claim in the last 5 years? ☐ Yes ☐ No  
IF YES, EXPLAIN

#### 4 EXPOSURE & RISK QUESTIONS — WARRANTIES, SUBCONTRACTORS & FINANCE PARTNERS

- 4-1 Does the applicant offer a written workmanship warranty? ☐ Yes ☐ No  
IF YES, EXPLAIN
- 4-2 Is the workmanship warranty backed by a third-party program that survives the installer? ☐ Yes ☐ No  
IF YES, EXPLAIN
- 4-3 Are monitoring and service commitments documented for the warranty period? ☐ Yes ☐ No  
IF YES, EXPLAIN
- 4-4 Are certificates of insurance collected from every subcontractor before work begins? ☐ Yes ☐ No  
IF YES, EXPLAIN
- 4-5 Is the applicant named as additional insured on subcontractors' policies, on a primary and non-contributory basis? ☐ Yes ☐ No  
IF YES, EXPLAIN
- 4-6 Does every subcontractor sign a written contract with a hold-harmless clause in the applicant's favor? ☐ Yes ☐ No  
IF YES, EXPLAIN
- 4-7 Are subcontractors required to carry workers' compensation, with proof verified? ☐ Yes ☐ No  
IF YES, EXPLAIN
- 4-8 Are subcontractors' insurance limits at least equal to the applicant's? ☐ Yes ☐ No  
IF YES, EXPLAIN
- 4-9 If yes to 2-3, are sales dealers bound by written sales-conduct standards? ☐ Yes ☐ No  
IF YES, EXPLAIN

#### 5 PAYROLL & RECEIPTS SUMMARY

| TOTAL ANNUAL PAYROLL (\$) | ANNUAL GROSS RECEIPTS (\$) | BATTERY STORAGE RECEIPTS (\$) |
|---------------------------|----------------------------|-------------------------------|
| <input type="text"/>      | <input type="text"/>       | <input type="text"/>          |

## 6 PRIOR INSURANCE & LOSS HISTORY

Attach currently valued loss runs for the last 5 years.

GL CARRIER / LIMITS

PROFESSIONAL / E&O (Y / N)

INLAND MARINE (STOCK / EQUIPMENT) LIMIT

6-1 Has any carrier declined, cancelled, or non-renewed coverage in the last 5 years?

☐ Yes ☐ No

IF YES, EXPLAIN

| DATE OF LOSS | DESCRIPTION | TOTAL INCURRED (\$) | OPEN / CLOSED |
|--------------|-------------|---------------------|---------------|
|              |             |                     |               |
|              |             |                     |               |
|              |             |                     |               |
|              |             |                     |               |
|              |             |                     |               |

6-2 Is the applicant aware of any incident, complaint, or circumstance not yet resulting in a claim that could reasonably give rise to one?

☐ Yes ☐ No

IF YES, EXPLAIN

## 7 RISK MANAGEMENT

7-1 Are installers trained on fall protection and electrical safety before working on roofs?

☐ Yes ☐ No

IF YES, EXPLAIN

7-2 Is panel and battery inventory stored securely and away from ignition sources?

☐ Yes ☐ No

IF YES, EXPLAIN

## 8 SIGNATURE & FRAUD WARNING

The undersigned declares that the statements and answers given in this supplemental are true, complete and correct to the best of their knowledge, and that no material fact has been withheld or misstated. The applicant agrees that this supplemental, together with all ACORD applications and attachments, forms the basis of any submission to insurers and may be relied upon by them. Signing this supplemental does not bind coverage. This supplemental is an intake document prepared by Cory Washington & Co. LLC to support carrier submission; it does not itself provide coverage.

**FRAUD NOTICE: Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance containing any materially false information, or conceals for the purpose of misleading information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties. (State-specific fraud warnings apply; see state amendatory notice.)**

APPLICANT / AUTHORIZED SIGNATURE (TYPE FULL NAME)

TITLE

DATE

PRODUCER — CORY WASHINGTON & CO. LLC

PRODUCER SIGNATURE (TYPE FULL NAME)

DATE