

Client Agreement

Independent solar case assessment & advocacy services

Draft business template — attorney review recommended before use. This template is designed around HappyPath Solar's current paid assessment services. Replace every bracketed field before sending it to a client, and have a qualified attorney review it for the states in which you operate.

Fillable fields. Every amber box and check box in this document is an unfilled placeholder for e-signature preparation (DocuSign or equivalent). Do not circulate this agreement until all placeholders are completed and all bracketed review notes are resolved.

Agreement details

EFFECTIVE DATE

[DATE]

HAPPYPATH SOLAR LEGAL ENTITY

[LEGAL ENTITY NAME]

BUSINESS ADDRESS

[BUSINESS ADDRESS]

CLIENT (LEGAL NAME)

[CLIENT LEGAL NAME]

CLIENT EMAIL

[CLIENT EMAIL]

CLIENT PROPERTY ADDRESS

[PROPERTY ADDRESS]

Agreement purpose

HappyPath Solar provides independent case-assessment and advocacy services to homeowners with solar-related problems. HappyPath Solar does not sell, install, repair, finance, manufacture, or warranty solar equipment, and is not affiliated with any installer, lender, manufacturer, or utility.

This agreement describes the assessment selected below. It does not authorize unlimited or open-ended advocacy work.

Selected service

Select one service:

☐ **Standard Case Assessment — \$199 flat fee**

☐ **Complex Case Assessment — \$[AGREED AMOUNT], not less than \$449**

AGREED COMPLEX CASE AMOUNT (IF SELECTED)

\$[AGREED AMOUNT] — not less than \$449

The selected assessment fee is due in full before HappyPath Solar begins work. Work begins when HappyPath Solar starts reviewing Client materials, researching the matter, or communicating with a third party about the case.

Standard Case Assessment

The Standard Case Assessment is designed for one clearly defined solar-related issue involving one responsible company, such as an installer, lender, manufacturer, or service company. The \$199 assessment includes:

- 1 Review of the core paperwork and case history Client provides.
- 2 One primary outreach to the responsible company and one follow-up.
- 3 A written action plan and escalation path.

The Standard Case Assessment does not include additional outreach, ongoing calls or escalation, negotiation, coordination among multiple parties, extended research, repair management, or any other advocacy beyond the items listed above. HappyPath Solar will quote additional work in writing before beginning it.

Complex Case Assessment

The Complex Case Assessment is for matters that require deeper diagnosis, including installer closure or bankruptcy, financing or lien questions, multiple involved companies, missing documentation, or other multi-party issues.

The agreed starting assessment fee includes:

- 1 Mapping the involved parties, key documents, and decision points.
- 2 Deeper research into the issue and potentially responsible parties.
- 3 A written action plan and proposed next-stage scope.

The Complex Case Assessment does not include continuing advocacy, repeated outreach, negotiation, repair coordination, legal work, litigation support, or other work beyond the written assessment scope. HappyPath Solar will provide a separate written scope and fee for any continued advocacy before that work begins.

Payment and additional work

- 1 **Upfront payment.** Client must pay the selected assessment fee in full before HappyPath Solar begins work. Payment link or invoice: **[PAYMENT LINK / INVOICE DETAILS]**.
- 2 **No open-ended work.** HappyPath Solar will not begin additional advocacy, escalation, or coordination unless Client approves a new scope and fee in writing.
- 3 **Third-party costs.** Repair, replacement, service-visit, equipment, permit, inspection, legal, filing, financing, utility, or other third-party costs are separate from HappyPath Solar's fees and are Client's responsibility.
- 4 **Refunds and cancellation.** Client may cancel in writing before work begins. If Client cancels before work begins, HappyPath Solar will refund the assessment fee less any nonrefundable payment-processing charge, unless applicable law requires otherwise. Once work begins, the assessment fee is earned and nonrefundable except as required by law. **[REVIEW AND CONFIRM THIS POLICY WITH COUNSEL.]**

PAYMENT LINK / INVOICE DETAILS

[PAYMENT LINK / INVOICE DETAILS]

Client responsibilities

Client agrees to:

- 1 Provide accurate, complete, and timely information, documents, screenshots, and communications relevant to the case.
- 2 Keep original records and promptly review any request for additional information.
- 3 Remain responsible for all decisions, payments, contracts, repairs, and communications made in Client's name.
- 4 Obtain any consent, release, or account authorization a third party requires before HappyPath Solar can communicate about the case.

Third-party communication

At Client's request, HappyPath Solar may communicate with third parties using information Client provides. HappyPath Solar does not have authority to sign documents, settle a dispute, make legal or financial commitments, modify Client's contracts, access Client accounts without authorization, or otherwise act as Client's legal representative.

Some installers, lenders, manufacturers, utilities, or other parties may require a separate authorization from Client. Client is responsible for completing any such authorization unless HappyPath Solar agrees otherwise in writing.

Important service limits

- 1 **No guarantee of outcome.** HappyPath Solar cannot guarantee a repair, refund, warranty coverage, production level, lender decision, utility decision, company response, or other outcome.
- 2 **Not legal, financial, tax, or engineering advice.** HappyPath Solar is not a law firm and does not provide legal, financial, tax, engineering, construction, electrical, or licensed repair advice. Client should consult an appropriately qualified professional when needed.
- 3 **No repair or installation services.** HappyPath Solar does not perform repairs, installation, replacement, maintenance, inspection, or electrical work.
- 4 **No contingency fee.** HappyPath Solar does not charge a percentage of any recovery, refund, credit, or savings unless the parties sign a separate written agreement that expressly states otherwise.

Confidentiality and records

HappyPath Solar will use Client information only to provide the selected services, manage the case, and comply with legal obligations. Client authorizes HappyPath Solar to retain business records and working notes related to the engagement for **[RETENTION PERIOD]**, subject to applicable law.

RETENTION PERIOD

[RETENTION PERIOD]

Limitation of liability

To the maximum extent allowed by applicable law, HappyPath Solar's total liability arising from this agreement or the selected services will not exceed the fees Client paid to HappyPath Solar for the specific assessment giving rise to the claim. HappyPath Solar will not be liable for indirect, incidental, special, consequential, exemplary, or punitive damages, including lost savings, lost profits, lost revenue, loss of use, or third-party actions or omissions.

Governing law and disputes

This agreement is governed by the laws of **[STATE]**, without regard to conflict-of-law principles. The parties will first attempt in good faith to resolve any dispute informally. If they cannot resolve it, exclusive venue will be in **[COUNTY, STATE]**, unless applicable law requires otherwise. **[REVIEW WITH COUNSEL.]**

GOVERNING LAW — STATE

[STATE]

EXCLUSIVE VENUE — COUNTY, STATE

[COUNTY, STATE]

Entire agreement and electronic acceptance

This agreement and any written scope or fee approval for additional work are the entire agreement between the parties about the selected assessment. Any change must be in writing and accepted by both parties. Electronic signatures and electronic acceptance are binding to the extent permitted by law.

Signatures

By signing below, each party accepts this agreement and the assessment selected above.

Client

[CLIENT LEGAL NAME]

CLIENT NAME

[SIGNATURE]

SIGNATURE

[SIGNATURE DATE]

DATE SIGNED

HappyPath Solar

[AUTHORIZED REPRESENTATIVE]

AUTHORIZED REPRESENTATIVE

[SIGNATURE]

SIGNATURE

[SIGNATURE DATE]

DATE SIGNED

Before sending for signature. Complete every amber placeholder: Effective date, HappyPath Solar legal entity, business address, client legal name, client email, client property address, selected service check box, agreed Complex Case amount (if applicable), payment link or invoice details, retention period, governing-law state, and venue county and state. Confirm the refund/cancellation policy and governing-law and venue terms with counsel.