

California AB 968 | Renovation Disclosure Preparation Checklist

For California single-family residential resales. Organizational aid only; not a substitute for statutory disclosure forms or legal advice.

1 | Applicability

- Record the date title transferred to the seller: _____
- Record the date the seller accepted the buyer's offer: _____
- Check whether acceptance occurred within 18 months after title transfer.
- Confirm offer acceptance was on or after July 1, 2024.
- Ask an agent or attorney about transaction-specific exceptions or other duties.

2 | Contractor-performed work

- List additions, structural modifications, alterations, and repairs performed by contractors engaged by the seller since title transfer.
- Match each entry to the work location, scope, approximate dates, and contractor.
- Request a work list from each contractor where helpful.
- Record projects even when contractor-name reporting thresholds may differ.

3 | Contractor information

- Record contractor names and contact details supplied to the seller.
- Review aggregate contract price against the current BPC §7027.2 threshold; do not assume an old dollar figure.
- Retain contracts, change orders, invoices, and communications.

4 | Permits and missing evidence

- Attach copies of permits obtained by the seller for covered work.
- For permits held by a third party and not supplied to the seller, record the third party and contact details provided to the seller.
- Confirm permit and final-inspection status separately with the relevant authority.
- Flag missing or inconsistent records; do not treat missing paperwork as proof no permit was required.

5 | Final review

- Reconcile the renovation list, contractor directory, and permit register.
- Identify unresolved items and assign a person to investigate.
- Discuss statutory disclosure documents and delivery timing with the transaction professionals.
- Retain copies of the final disclosure package and supporting evidence.

Sources: California Civil Code §1102.6h; Business and Professions Code §7027.2. Review current statutes before relying on a threshold.

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