

THE CHECKLIST

FOR SELLING A LOVED ONES HOME FROM AFAR

• PHASE 1: GET GUIDANCE EARLY	✓
Talk to a local real estate agent who knows probate and trust sales before doing anything with the house.	
Confirm who has legal authority to sell (executor, trustee, or court-appointed administrator).	
Ask an attorney whether probate court approval or confirmation is needed (confirm with a California probate attorney).	
Ask a CPA about tax questions such as stepped-up basis and capital gains (confirm with a CPA).	
Write down every decision-maker (siblings, heirs, beneficiaries) and how each will be kept informed.	
Pick one point person for questions, so the agent is not getting five different answers.	
Get a date-stamped market opinion and a likely price range.	

• PHASE 2: SETUP LOCAL SUPPORT AND ACCESS	✓
Name your local team: agent, attorney, CPA, handyman, cleaner, stager, photographer.	
Decide how the agent and vendors get in (lockbox, key handoff, smart lock) and who holds the codes.	
Change the locks or re-key if you are unsure who has keys.	
Ask for a walkthrough video of every room, the garage, the yard, and the roof.	
Secure valuables, important papers, medications, and firearms. Document what you remove and where it went.	
Take photos of sentimental items and decide who gets what before cleanout.	
Set up mail forwarding and an update schedule (for example a weekly call or text with your agent).	
Get written quotes and written scopes of work for every vendor, and keep receipts in one folder.	

• PHASE 3: PREP WITHOUT OVER IMPROVING	✓
Ask your agent for a short list of what buyers in this price range expect, and what they will not pay extra for.	
Sort every project into: must fix (safety, leaks, roof, electrical), cheap and visible (paint, deep clean, landscaping, light fixtures), and skip.	
Set a prep budget of \$[] and a hard stop date of [].	

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• PHASE 3: PREP WITHOUT OVER IMPROVING (CONT.)	✓
Ask whether selling as-is, with disclosures, makes more sense than repairs (discuss with your agent).	
Consider a pre-listing inspection so there are no surprises later.	
Clear clutter and personal items. Empty and clean rooms show larger.	
Get a quote for cleanout or estate-sale help if there are lots of belongings.	

• PHASE 4: KNOW YOUR HOLDING COSTS (FILL IN \$ SO YOU CAN SEE TOTAL COST)
Property taxes: \$[] per month.
Homeowner's insurance: \$[] per month. Ask the insurer if the cost changes when the home is vacant. Many policies limit coverage after a set number of days.
Total utilities cost (keep power, water, and heat or A/C on for safety): \$[] per month.
Lawn, landscaping, pool, and other maintenance: \$[] per month.
Secure valuables, important papers, medications, and firearms. Document what you remove and where it went.
Monthly HOA dues: \$[].
Mortgage, reverse mortgage, or lien payments: \$[] per month.
Security, cleaning, and check-ins: \$[] per month.
TOTAL PER MONTH: \$[]. Total per week: \$[]

• PHASE 5: BUILD THE PLAN AND TIMELINE	✓
Target list date:	
Target closing date:	
Change the locks or re-key if you are unsure who has keys.	
Work backward and put due dates on prep, photos, disclosures, and paperwork.	
Gather documents: title or trust documents, death certificate (if applicable), prior disclosures, permits, warranties, HOA documents, utility bills.	
Agree on the pricing plan and what happens if there are no offers in [] days.	
Decide what happens to items nobody wants (donate, sell, haul away) and who pays.	

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• PHASE 5: BUILD THE PLAN AND TIMELINE	✓
Schedule a check-in with your agent every [week or two weeks] until closing.	
Plan the final walkthrough, key handoff, and shutoff of utilities after closing.	

QUICK REMINDERS:

- Every estate is different. Use this list to ask better questions, not as legal or tax advice.
- When in doubt, call your attorney or CPA before you sign or spend.
- Vacant homes are a risk. The sooner you have a plan, the lower your holding costs.

NEED HELP?

We help families sell their loved one's home from out of town.

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This checklist is general information, not legal, tax, or financial advice.