House Condition Worksheet

The house itself, for the probate referee. Photograph it, get it estimated, send it on.

The probate referee puts a value on the house for the court, and often appraises the property from a drive-by and from comparable sales. The referee doesn't see the cracked slab, the old wiring or the leaking roof unless someone shows them. **This worksheet is how you show them.** On a court-confirmed sale, that appraisal sets the floor under your price (Chapter 10), so it's worth getting right.

This worksheet is for the house itself: its structure, systems and condition. Personal property, everything inside the house, goes on the Room-by-Room Contents Worksheet.

How to use it

1 Walk the house
The house itself: every room, the garage, the roof line, the yard. Pages 2 and 3.

2 Take photos
One wide shot and one close-up of each problem. Note the photo numbers.

3 Get estimates
Written, from licensed contractors, for the problems that matter. Page 4.

4 Send it on
To DB, your REALTOR®, first. Then to your attorney, before the inventory is due.

The estate

Property address

City and ZIP

Case number

Personal Representative

Date Letters issued

Estate attorney

Attorney phone or email

Inventory due (Letters + 4 months)

Probate referee (name)

Documented by

Date documented

Before you start

- [ ] Confirm your attorney knows you're preparing condition information for the referee
- [ ] Power, water and gas on, so systems can be shown working, or not
- [ ] Access set up for contractors (lockbox code, who lets them in)
- [ ] Nobody living there, or written notice given before entry

Accuracy is the goal — a value that's too low has its own cost at tax time (Chapter 16). Write down what's true, and let the estimates speak for the price.

DB · 310-895-9018
Want help documenting the house? Thirty-two years in construction. Call DB.

Estate Quick Check
Where things stand, in 1, 3 or 5 minutes.
davidbrucerealty.com/estate-check

Executor's Guide
to Southern California Probates.
davidbrucerealty.com/executors-guide

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What to check	OK	Problem	Not sure	Photo #s	Estimate needed	Notes
STRUCTURE AND OUTSIDE						
Roof Age, leaks, missing or broken shingles or tiles, sagging	☐	☐	☐		☐	
Foundation or slab Cracks, sloping floors, doors and windows that stick	☐	☐	☐		☐	
Drainage and hillside Standing water, grading toward the house, retaining walls	☐	☐	☐		☐	
Exterior walls Stucco or siding cracks, peeling paint, wood rot	☐	☐	☐		☐	
Windows and doors Broken glass, failed seals, rotted frames, locks	☐	☐	☐		☐	
Decks, patios, balconies Dry rot, loose railings, soft boards	☐	☐	☐		☐	
Trees and landscaping Roots near the foundation or sewer, dead trees	☐	☐	☐		☐	
Fences, gates, driveway Leaning or broken fences, cracked driveway	☐	☐	☐		☐	
Pool or spa Equipment working, cracks, green water, safety fencing	☐	☐	☐		☐	
SYSTEMS						
Electrical panel and wiring Panel age and brand, old wiring, ungrounded outlets	☐	☐	☐		☐	
Plumbing supply Old galvanized pipe, low pressure, active leaks	☐	☐	☐		☐	
Sewer line Backups, slow drains; ask about a camera inspection	☐	☐	☐		☐	
Water heater Age, rust, leaks, earthquake strapping	☐	☐	☐		☐	
Heating and air conditioning Age, does it run, the last service	☐	☐	☐		☐	
Gas Any gas smell (leave and call the gas company), old lines	☐	☐	☐		☐	

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What to check	OK	Problem	Not sure	Photo #s	Estimate needed	Notes
INSIDE						
Water damage Ceiling stains, under sinks, around tubs and toilets	☐	☐	☐		☐	
Mold or musty smell Bathrooms, closets, behind furniture, the garage	☐	☐	☐		☐	
Kitchen Dated or broken appliances, cabinets, counters	☐	☐	☐		☐	
Bathrooms Leaks, soft floors, cracked tile, dated fixtures	☐	☐	☐		☐	
Floors Damaged carpet, lifted or rotted subfloor, worn wood	☐	☐	☐		☐	
Walls and ceilings Cracks, holes, sagging	☐	☐	☐		☐	
Smoke, fire or odor Smoke damage, cigarette or pet odor	☐	☐	☐		☐	
Pests Termites, rodents, droppings, damage	☐	☐	☐		☐	
PERMITS AND OTHER COSTS						
Unpermitted work Additions, a converted garage, an ADU, enclosed patios	☐	☐	☐		☐	
Heavy contents What it will cost to clear the house (Chapter 13)	☐	☐	☐		☐	
Older building materials Pre-1978 paint, old tile or popcorn ceilings: don't disturb	☐	☐	☐		☐	
Anything else Whatever a buyer's inspector would point to	☐	☐	☐		☐	

Things of value inside the house go on the Room-by-Room Contents Worksheet, not here.

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Contractor estimates

Written, from licensed contractors

Trade	Company	License #	Date	Amount	What it covers

Ask each contractor to write down exactly what the price includes and what it leaves out. Three bids that look $40,000 apart are usually bids for different work (Chapter 12).

The packet for DB and your attorney

Send DB a copy first. Your REALTOR® uses it to price and market the house. Then send it to your attorney, who forwards it to the referee.

- ☐ Photos, numbered, matching the photo numbers on pages 2 and 3
- ☐ This worksheet, filled in
- ☐ Every written estimate, with the contractor's license number
- ☐ A short note listing the biggest problems and the estimate total

Sent to DB (date)	Sent to attorney (date)	Attorney (name)	Sent to referee (date)

Notes

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