Room-by-Room Contents Worksheet

Walk the house one room at a time. Write it down before anything leaves.

Before the cousin takes the painting she was promised, before the first bag goes to the curb, walk the house and write down what's there. It takes an afternoon or two, and it's the best protection you have as a fiduciary. **Nothing leaves the house yet.**

This worksheet is for what's inside the house: your personal property. The house itself, its structure, systems and condition, goes on the House Condition Worksheet.

1 Document	2 Clear	3 Sort	4 Value	5 Disperse
Photograph and list everything. This worksheet.	Get the attorney's OK in writing before anything leaves.	Keep, sell, donate, discard. Write down who takes what.	Find out what things are worth before they go.	Estate sale, auction, donation, cleanout, safe disposal.

YOU ARE HERE: STEP 1. The room tracker below follows each room through all five steps.

Before you start

☐ Every room photographed Date _____ ☐ Attorney's written OK Date _____

Property address _____ Documented by _____

Room tracker

	Photos	Listed	Cleared	Sorted	Valued	Out	Notes
Entry and halls	☐	☐	☐	☐	☐	☐	
Living room	☐	☐	☐	☐	☐	☐	
Dining room	☐	☐	☐	☐	☐	☐	
Kitchen and pantry	☐	☐	☐	☐	☐	☐	
Family room or den	☐	☐	☐	☐	☐	☐	
Office	☐	☐	☐	☐	☐	☐	
Primary bedroom	☐	☐	☐	☐	☐	☐	
Bedroom 2	☐	☐	☐	☐	☐	☐	
Bedroom 3	☐	☐	☐	☐	☐	☐	
Bathrooms	☐	☐	☐	☐	☐	☐	
Linen and hall closets	☐	☐	☐	☐	☐	☐	
Laundry	☐	☐	☐	☐	☐	☐	
Garage	☐	☐	☐	☐	☐	☐	
Attic or basement	☐	☐	☐	☐	☐	☐	
Shed, patio and yard	☐	☐	☐	☐	☐	☐	
Vehicles	☐	☐	☐	☐	☐	☐	
Safe or safe-deposit box	☐	☐	☐	☐	☐	☐	
Storage unit	☐	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	☐	

For educational purposes only. Not legal or tax advice. David Bruce is not an attorney; please discuss any legal matter with your attorney.
David Bruce, REALTOR® · C.A.R. Certified Probate & Trust Specialist and CPRES · eXp Realty · DRE #01839192
Equal Housing Opportunity · Call DB at 310-895-9018 · © 2026 David Bruce. All rights reserved.

Find these before anything else moves

These are the things that get lost, thrown out or walked off with in the first week. As you find them, check them off and write down where they were and where they are now.

Found	Where it was found	Where it is now / who has it
☐ **Papers** Wills, trusts, deeds, titles, insurance policies, account statements, tax returns, checkbooks.		
☐ **Keys and combinations** Safe-deposit keys, safe combinations, vehicle keys and titles, the passwords list.		
☐ **Cash, coins and bullion** Count it with a second person present, photograph it, and note where it went.		
☐ **Jewelry and watches** Look for marks like 750, 585 or 925 before anyone calls it costume jewelry.		
☐ **Firearms and ammunition** Make sure every firearm is unloaded. Not comfortable handling one? Leave it where it is. DB can help with this.		
☐ **Ivory and protected materials** Ivory keys, scrimshaw, netsuke, some inlays. These can't go in the estate sale (Chapter 14).		
☐ **Art and collectibles** Keep every receipt, certificate and appraisal with the piece. Provenance is part of the value.		
☐ **Computers, phones and tablets** Don't wipe, sell or donate them yet. They may hold accounts the estate needs.		
☐ **Medications and sharps** Get them out early. Free take-back sites are in Chapter 14.		
☐ **Paint, chemicals, batteries** Paint goes to PaintCare; chemicals, batteries, bulbs and electronics to household hazardous waste.		
☐ **Photos, letters and heirlooms** The things that can't be replaced. Set them aside for the family.		
☐ **Promised or borrowed** Anything promised in the will or in conversation, or that belongs to someone else.		

DB · 310-895-9018

Found guns, ivory, old medications or a garage full of chemicals? 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

For educational purposes only. Not legal or tax advice. David Bruce is not an attorney; please discuss any legal matter with your attorney.
David Bruce, REALTOR® · C.A.R. Certified Probate & Trust Specialist and CPRES · eXp Realty · DRE #01839192
Equal Housing Opportunity · Call DB at 310-895-9018 · © 2026 David Bruce. All rights reserved.

Contents Worksheet

Room | Date | Documented by

Photos: ☐ Every wall ☐ Closets open ☐ Drawers and cabinets open ☐ Under beds, high shelves

Photo numbers, from ____ to ____

			SORT (after the attorney's OK)					
Item and description	Where in the room	Photo #	Keep	Sell	Donate	Discard	Ask first	Look closer
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐

Look closer: it may be worth more than it looks. Marks, signatures, labels, old paperwork. Flag it before the sale, not after.

Notes for this room (what family asked for, what needs a specialist, what's staying with the house)

For educational purposes only. Not legal or tax advice. David Bruce is not an attorney; please discuss any legal matter with your attorney.
David Bruce, REALTOR® · C.A.R. Certified Probate & Trust Specialist and CPRES · eXp Realty · DRE #01839192
Equal Housing Opportunity · Call DB at 310-895-9018 · © 2026 David Bruce. All rights reserved.

Room | Date | Documented by

Photos: ☐ Every wall ☐ Closets open ☐ Drawers and cabinets open ☐ Under beds, high shelves

Photo numbers, from ____ to ____

			SORT (after the attorney's OK)					
Item and description	Where in the room	Photo #	Keep	Sell	Donate	Discard	Ask first	Look closer
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐

Look closer: it may be worth more than it looks. Marks, signatures, labels, old paperwork. Flag it before the sale, not after.

Notes for this room (what family asked for, what needs a specialist, what's staying with the house)

For educational purposes only. Not legal or tax advice. David Bruce is not an attorney; please discuss any legal matter with your attorney.
David Bruce, REALTOR® · C.A.R. Certified Probate & Trust Specialist and CPRES · eXp Realty · DRE #01839192
Equal Housing Opportunity · Call DB at 310-895-9018 · © 2026 David Bruce. All rights reserved.

Room | Date | Documented by

Photos: ☐ Every wall ☐ Closets open ☐ Drawers and cabinets open ☐ Under beds, high shelves

Photo numbers, from ____ to ____

			SORT (after the attorney's OK)					
Item and description	Where in the room	Photo #	Keep	Sell	Donate	Discard	Ask first	Look closer
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐

Look closer: it may be worth more than it looks. Marks, signatures, labels, old paperwork. Flag it before the sale, not after.

Notes for this room (what family asked for, what needs a specialist, what's staying with the house)

For educational purposes only. Not legal or tax advice. David Bruce is not an attorney; please discuss any legal matter with your attorney.
David Bruce, REALTOR® · C.A.R. Certified Probate & Trust Specialist and CPRES · eXp Realty · DRE #01839192
Equal Housing Opportunity · Call DB at 310-895-9018 · © 2026 David Bruce. All rights reserved.

Room | Date | Documented by

Photos: ☐ Every wall ☐ Closets open ☐ Drawers and cabinets open ☐ Under beds, high shelves

Photo numbers, from ____ to ____

			SORT (after the attorney's OK)					
Item and description	Where in the room	Photo #	Keep	Sell	Donate	Discard	Ask first	Look closer
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐

Look closer: it may be worth more than it looks. Marks, signatures, labels, old paperwork. Flag it before the sale, not after.

Notes for this room (what family asked for, what needs a specialist, what's staying with the house)

For educational purposes only. Not legal or tax advice. David Bruce is not an attorney; please discuss any legal matter with your attorney.
David Bruce, REALTOR® · C.A.R. Certified Probate & Trust Specialist and CPRES · eXp Realty · DRE #01839192
Equal Housing Opportunity · Call DB at 310-895-9018 · © 2026 David Bruce. All rights reserved.

Room | Date | Documented by

Photos: ☐ Every wall ☐ Closets open ☐ Drawers and cabinets open ☐ Under beds, high shelves

Photo numbers, from ____ to ____

			SORT (after the attorney's OK)					
Item and description	Where in the room	Photo #	Keep	Sell	Donate	Discard	Ask first	Look closer
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐

Look closer: it may be worth more than it looks. Marks, signatures, labels, old paperwork. Flag it before the sale, not after.

Notes for this room (what family asked for, what needs a specialist, what's staying with the house)

For educational purposes only. Not legal or tax advice. David Bruce is not an attorney; please discuss any legal matter with your attorney.
David Bruce, REALTOR® · C.A.R. Certified Probate & Trust Specialist and CPRES · eXp Realty · DRE #01839192
Equal Housing Opportunity · Call DB at 310-895-9018 · © 2026 David Bruce. All rights reserved.

Room | Date | Documented by

Photos: ☐ Every wall ☐ Closets open ☐ Drawers and cabinets open ☐ Under beds, high shelves

Photo numbers, from ____ to ____

			SORT (after the attorney's OK)					
Item and description	Where in the room	Photo #	Keep	Sell	Donate	Discard	Ask first	Look closer
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐

Look closer: it may be worth more than it looks. Marks, signatures, labels, old paperwork. Flag it before the sale, not after.

Notes for this room (what family asked for, what needs a specialist, what's staying with the house)

For educational purposes only. Not legal or tax advice. David Bruce is not an attorney; please discuss any legal matter with your attorney.
David Bruce, REALTOR® · C.A.R. Certified Probate & Trust Specialist and CPRES · eXp Realty · DRE #01839192
Equal Housing Opportunity · Call DB at 310-895-9018 · © 2026 David Bruce. All rights reserved.

Who took what

After the attorney's OK (Chapter 13, step 3)

When family members take things, write it down and have them sign for it. It's part of the record you keep as a fiduciary, and it heads off the conversation nobody wants to have later.

Item	Taken by	Date	Signature or initials	Notes

DB · 310-895-9018

Rather not do it alone? Questions about what's in the house? 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

For educational purposes only. Not legal or tax advice. David Bruce is not an attorney; please discuss any legal matter with your attorney.
David Bruce, REALTOR® · C.A.R. Certified Probate & Trust Specialist and CPRES · eXp Realty · DRE #01839192
Equal Housing Opportunity · Call DB at 310-895-9018 · © 2026 David Bruce. All rights reserved.