



## **Team Reis Realtors**

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## **Estate Property Next Steps Checklist**

- Confirm who has legal authority (Personal Representative or Trustee)
- Determine if probate is required
- Open probate if necessary
- Confirm authority to sell (or request License to Sell)
- Verify how the property is titled
- Check for liens, reverse mortgage, or estate debt
- Coordinate with heirs (if applicable)
- Determine occupancy status (vacant or occupied)
- Evaluate property condition
- Confirm septic / Title V requirements
- Review insurance coverage
- Secure the property if vacant
- Decide whether to sell as-is or make improvements
- Address personal property / cleanout plan
- Determine timeline for sale
- Understand tax considerations (stepped-up basis)
- Prepare documentation for sale
- Consult with estate attorney if needed
- List the property when authority is confirmed
- Accept offer and proceed with required approvals
- Close and settle estate obligations