

Secure the Property and Information

A calm framework for evaluating an inherited home

Before deciding whether to keep or sell, protect the home and assemble the facts needed by the family and professional advisors.

- **Confirm insurance, utilities, locks, mail, and basic maintenance**
- **Locate estate documents, title information, loans, and tax records**
- **Identify every person or entity with decision-making authority**
- **Protect valuables and personal documents**
- **Avoid distributing or discarding property prematurely**

Clarify Ownership and Authority

The correct sale process depends on how title is held and whether the property is in a trust, estate, or probate proceeding.

- **Speak with the trustee, executor, or estate attorney**
- **Confirm who may sign listing and sale documents**
- **Ask about required notices, approvals, or court procedures**
- **Review property-tax and basis questions with qualified advisors**
- **Keep written records of decisions and expenses**

This guide is educational and is not legal or tax advice.

Evaluate the Property

Compare the value and risk of selling as-is with targeted preparation.

- Obtain a property-specific market assessment
- Document condition and visible deferred maintenance
- Consider inspections when they may reduce uncertainty
- Prioritize safety, cleanout, cleaning, and curb appeal
- Avoid major renovations without a clear market rationale

Choose and Coordinate the Sale

The right plan balances net proceeds, timing, family needs, effort, and certainty.

- Compare as-is, prepared-market, and other legitimate sale paths
- Request estimated proceeds for each practical scenario
- Agree on communication and decision-making among stakeholders
- Coordinate personal-property removal before photography
- Plan access, disclosures, offer review, and closing

For a confidential inherited-property assessment, contact Dean Rinker at 916-508-5353.