DAK BRITT | INHERITED PROPERTY SALES

Before You Meet the Attorney

What to gather and what to ask

A little preparation makes your first meeting easier and helps your attorney help you. Bring what you can find. It's fine if some of it is missing.

What to gather

- ☐ Certified copies of the death certificate
- ☐ The will, the original if you have it, and any trust papers
- ☐ Names and addresses of close family members
- ☐ The deed, or the property's page on the county auditor's website
- ☐ Recent mortgage, tax, and insurance statements for the property
- ☐ Recent bank, retirement, and life insurance statements
- ☐ Vehicle titles, if any
- ☐ A list of bills and debts you know about

What to ask

1. Does the estate need to go through probate, and what kind?
2. Who will serve as executor or administrator, and how long until that's in place?
3. How will the estate get the power to sell the property?
4. Can we start planning the sale now? Is there anything we should avoid doing with the property?
5. What will you need from me, and how should we stay in touch?
6. How are your fees set up?

Notes

Who handles what

Your attorney handles the legal steps. I handle the property: its value, your selling options, preparation, and the sale, working alongside your attorney. One point of contact for the property.

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