

Estate Property Sale Checklist

A practical starting point for personal representatives, trustees, families, attorneys and financial advisers.

Name: _____ Property: _____

1. Confirm who can act

- ☐ Ask the attorney to confirm ownership, signing authority, required documents and any approvals before listing or accepting an offer.
- ☐ Identify the decision-maker, attorney, financial adviser and main family contact.

2. Protect the property

- ☐ Confirm appropriate insurance, including any vacancy restrictions.
- ☐ Arrange access, security, utilities, seasonal upkeep and regular property checks.
- ☐ Track taxes, loan payments, insurance and other carrying costs.

3. Gather information

- ☐ Collect available title/ownership records, mortgage details, tax bills and repair records.
- ☐ Identify leases, occupants, liens or other issues for attorney/title review.
- ☐ Coordinate any date-of-death valuation need with the attorney or tax adviser; distinguish it from current sale pricing.

4. Choose a sale plan

- ☐ Separate belongings to keep, distribute, sell or remove before cleanout.
- ☐ Compare selling as-is with selective preparation using estimated costs and timing.
- ☐ Review market value, likely net proceeds and the cost of holding the property.
- ☐ Agree on the preparation budget, vendor responsibilities and communication plan.

5. Coordinate through closing

- ☐ Have the attorney/broker confirm applicable disclosures and contract provisions.
- ☐ Compare offer price, financing, contingencies, closing timing and expected proceeds.
- ☐ Coordinate signatures, access, belongings and closing documents with the authorized parties.

Priority / deadline: _____ Next action: _____

Your next step

Bring this page to a conversation with Andrew. Together, we can build a property-specific plan around your goals, timing, and next decision.

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Legal resource: [State Bar of Wisconsin - Probate information](#). Andrew coordinates the real estate work with your professional advisers.

Planning resource | September 2026. Confirm legal, tax, financing, and care questions with the appropriate professional.