TOOL 11

First 30 Days: Estate & Property Roadmap

AREA	QUESTION TO ANSWER	WHO IS HANDLING IT?	STATUS
Legal authority	Trust administration, probate, or other transfer process?		
Title	Who owns the property now?		
Insurance	Is current coverage appropriate for occupancy / vacancy?		
Mortgage	What payments or deadlines continue?		
Property taxes	Any reassessment / Prop 19 issues to review?		
Valuation	Is a date-of-death or probate appraisal needed?		
Condition	Any urgent repair, leak, security, or safety issue?		
Personal property	What must be preserved before cleanout?		
Tax	What does the CPA need now?		

AREA	QUESTION TO ANSWER	WHO IS HANDLING IT?	STATUS
Real estate	Keep, rent, buyout, or sell?		
Family	Who needs updates and how often?		

NOTES