TOOL 17

Questions for the Attorney

- ☐ Who currently has legal authority to act?
- ☐ Is the home properly titled?
- ☐ Is probate required, or is another transfer process available?
- ☐ If probate is open, have Letters issued?
- ☐ What level of IAEA authority exists?
- ☐ Is a Notice of Proposed Action required?
- ☐ Could court confirmation be required?
- ☐ Can estate or trust funds be used for repairs or renovation?
- ☐ Are beneficiary notices or approvals needed?
- ☐ Is a beneficiary buyout legally straightforward in this situation?
- ☐ Are there occupancy, capacity, or conflict issues we should address before a sale?
- ☐ What documents should title and escrow receive?

ATTORNEY NOTES: