

Executor Property Checklist

Inherited a home? Start by protecting the property, gathering the facts, and confirming who is authorized to act. Work through these steps at your own pace.

01 Protect the property

- ☐ Secure doors, windows, and other entry points; consider rekeying locks.
- ☐ Ask the insurer about coverage and requirements for a vacant or unoccupied home.
- ☐ Check utilities, leaks, heat, and urgent maintenance needs.
- ☐ Arrange mail forwarding, property checks, and lawn or snow care.

02 Gather key records

- ☐ Locate the deed, mortgage, tax, insurance, and HOA records.
- ☐ Gather the will, trust, and available court documents.
- ☐ Identify the authorized estate representative and estate attorney.
- ☐ Keep an expense file; ask the attorney or CPA whether a date-of-death valuation is needed.

03 Document belongings

- ☐ Photograph rooms and contents before removing items.
- ☐ Identify important papers, valuables, and family keepsakes.
- ☐ Confirm authority before distributing, selling, donating, or discarding items.
- ☐ Plan what to keep, donate, sell, or remove with the authorized representative.

04 Review condition and costs

- ☐ Walk through the home and note safety and maintenance concerns.
- ☐ Assess repair and clean-out needs before committing to major work.
- ☐ Gather information on mortgages, liens, and other property obligations.
- ☐ Track ongoing taxes, insurance, utilities, and maintenance costs.

05 Explore the property options

- ☐ Consider keeping the home or transferring it to an heir, with professional guidance.
- ☐ Compare a traditional sale with a sale in current or as-is condition.
- ☐ Ask a real estate professional about current market value and sale options.
- ☐ Weigh timing, condition, costs, and family priorities before deciding.

06 Build your support team

- ☐ Estate or probate attorney for authority and legal questions.
- ☐ CPA or tax professional and insurance professional.
- ☐ Real estate professional familiar with inherited properties; appraiser when appropriate.
- ☐ Clean-out, estate-sale, or maintenance professionals as needed.

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