

Executor Checklist: Probate Property in Sacramento & Placer County

This checklist is designed to help executors, administrators, and heirs navigate probate property responsibilities in California. Always consult a qualified probate attorney for legal advice.

Step 1: Confirm Probate Requirement

- Determine if probate is required under California law
- Review title ownership of the property
- Check for a living trust or transfer-on-death deed

Step 2: Secure the Property

- Change locks if the property is vacant
- Maintain homeowner's insurance
- Secure valuables and important documents

Step 3: Hire a Probate Attorney

- File probate petition with Sacramento or Placer County court
- Obtain Letters Testamentary or Letters of Administration
- Confirm authority to sell real estate

Step 4: Assess the Property

- Evaluate condition and repair needs
- Identify hoarding, deferred maintenance, or safety issues
- Determine occupancy or tenant status

Step 5: Decide Whether to Keep or Sell

- Review heir and beneficiary agreements
- Assess financial obligations of the estate
- Compare repair costs vs selling as-is

Step 6: If Selling the Property

- Confirm court approval or IAEA authority
- Evaluate cash buyer vs traditional sale
- Obtain probate-compliant purchase agreement

Step 7: Close Probate

- Pay debts, liens, and estate expenses

- Distribute proceeds to heirs
- File final accounting and close probate