

Inherited Home Checklist

First steps, documents to gather, and questions to ask before listing an inherited Snohomish County property.



CURT SIMMONS

PRIME LISTINGS GROUP

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Snohomish County Real Estate Since 2003

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A personal introduction

Hi, I'm Curt Simmons. I've helped Snohomish County buyers and sellers since 2003. Before real estate, I spent a decade working in residential and commercial construction, which gives me a practical perspective on home condition, repairs and preparation.

Inherited property can involve more than a real estate decision. You may be sorting out legal authority, belongings, repairs, family decisions and timing. I put this resource together to help you understand the choices and organize your next steps. I can help evaluate the property and plan a sale while qualified legal and tax professionals handle those specialized questions.

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First steps: secure and stabilize | Ownership and estate documents to locate | Property and financial information | People to consult

When you are ready to discuss your property: Call or text 425-422-0563 or visit primelistingsgroup.net.

First steps: secure and stabilize

- ☐ Confirm who is authorized to manage, enter and make decisions about the property.
- ☐ Check locks, access, occupancy and condition; protect valuables and sensitive documents.
- ☐ Contact the insurer about vacancy, occupancy and any needed coverage changes.
- ☐ Check mortgage, property taxes, HOA, utilities and important payment dates.
- ☐ Check for water leaks, heating problems, storm damage and other urgent maintenance.
- ☐ Coordinate personal belongings and access with authorized parties; do not discard property without approval.

Ownership and estate documents to locate

- ☐ Certified death certificate (as requested by professionals).
- ☐ Current recorded deed and parcel number / legal description.
- ☐ Will, if one exists, and relevant estate attorney contact information.
- ☐ Trust documents or trustee certification, if applicable.
- ☐ Community property agreement, survivorship or transfer-on-death documents, if applicable.
- ☐ Probate case number, court orders and letters testamentary/administration, if applicable.
- ☐ Names and contact details of authorized representatives and relevant interested parties.
- ☐ Existing title report or title insurance policy, if available.

Property and financial information

- ☐ Latest mortgage statement and HELOC/other loan details.
- ☐ Property tax assessment and payment status.
- ☐ HOA/condominium dues, statements and governing information, if applicable.
- ☐ Homeowners insurance policy and claims history, if available.
- ☐ Utility accounts, service providers and average bills.
- ☐ Repair permits, roof/HVAC records, warranties, septic/well records if applicable.
- ☐ Lease, tenant and deposit records, if occupied by a renter.
- ☐ Any available prior appraisal or date-of-death valuation documents.

People to consult

- ☐ Washington estate attorney: inheritance route, signer authority, disputes and estate duties.
- ☐ Title/escrow: vesting, liens, documentation and conveyance requirements.
- ☐ CPA/tax adviser: basis, estate and income tax treatment, REET and reporting.
- ☐ Curt Simmons: present-day value, as-is vs. prepared pricing, marketing and timeline.

Before signing a listing agreement

- ☐ Obtain professional confirmation of authority to sell.
- ☐ Clarify how sale-related decisions and communications will be handled.
- ☐ Ask whether any court approval or additional documentation is required.
- ☐ Review net proceeds estimate and property condition strategy.
- ☐ Discuss any applicable seller disclosures with appropriate professionals.

Working notes

Property address: _____

Attorney / title contact: _____

Next action and responsible person: _____

Target date: _____

Local help: 425-422-0563 | curt@primelistingsgroup.net | primelistingsgroup.net

Important: General educational information only; not legal, tax, financial, or title advice. Probate, authority to sell, exemptions and taxes vary. Consult a Washington estate attorney, title/escrow professional and tax adviser as appropriate. October 2026.