PROBATE & MORE
COURT DOCUMENTS MADE SIMPLE

Probate Real Estate Agent Interview Checklist

Use this checklist when interviewing agents to handle a California probate sale

A qualified probate agent will answer every item on this list clearly and without hesitation.

EXPERIENCE & QUALIFICATIONS

- ☐ Has completed at least 5 to 10 California probate sales -- not just estate or trust sales
- ☐ Can describe specific probate transactions and challenges navigated
- ☐ Holds a probate designation such as CPRES or equivalent
- ☐ Regularly works alongside probate attorneys and Legal Document Assistants
- ☐ Familiar with California probate court procedures and filing requirements

PRICING & MARKETING STRATEGY

- ☐ Uses the referee appraisal as a pricing baseline alongside comparable sales
- ☐ Identifies the right buyer pool -- investors, cash buyers, or traditional buyers
- ☐ Understands as-is probate disclosure requirements and includes them in listings
- ☐ Has a clear strategy for vacant or deferred maintenance properties
- ☐ Sets buyer expectations about court timelines and confirmation requirements upfront

KNOWLEDGE OF PROBATE LAW & PROCESS

- ☐ Explains full authority vs. limited authority under IAEA without prompting
- ☐ Understands how the Notice of Proposed Action (DE-165) works and when it applies
- ☐ Familiar with court confirmation hearings and overbid procedures
- ☐ Understands the probate referee appraisal and the 90 percent rule
- ☐ Knows how to structure a purchase agreement for a probate sale

COMMUNICATION & TEAM COORDINATION

- ☐ Has a clear communication plan for keeping multiple beneficiaries informed
- ☐ Documents pricing decisions and offer evaluations in writing
- ☐ Understands the executor's fiduciary duty and how it affects decisions
- ☐ Works collaboratively with the full probate team rather than around it
- ☐ Can provide references from probate attorneys or LDAs they have worked with

COSTS & TRANSPARENCY

- ☐ Provides a complete written estimate of selling costs before listing
- ☐ Clearly discloses commission and how it is paid from estate proceeds
- ☐ Understands court approval may be required for commission in limited authority sales
- ☐ Does not pressure for a quick sale that ignores court timelines

RED FLAGS -- Walk Away If the Agent:

- **X** Says probate sales are "basically the same" as regular listings
- **X** Cannot explain IAEA, overbids, or the referee appraisal
- **X** Pushes for quick sale without understanding your authority level
- **X** No references from probate attorneys or LDAs

Need help finding a probate-experienced agent in your area? **probateandmore.com**

Contact Probate & More -- we work alongside agents across California who specialize in probate sales. 916-243-0311 | California Registered LDA