

Safe Early Steps in Probate

A Simple Checklist for Families Handling a Property.

The early stage of probate is usually about protecting the property, gathering the right information, and avoiding unnecessary mistakes before making bigger decisions.

1. Secure the Property, Dependents, and Pets

Typical timing: Usually within the first few days, starting on day one, if real estate is involved.

If the estate includes a home, one of the first priorities is ensuring the property is secure and that no person or animal who depends on that home is overlooked.

That often means checking doors and windows, collecting mail, confirming who has keys or access, and making sure the property does not appear neglected.

It also means paying close attention to any elderly occupant, child, or pet still connected to the home. These situations are often left out of conversation, but they deserve immediate care and attention.

If there are alarm systems, gates, cameras, or garage remotes, those should also be reviewed early. A vacant or poorly monitored property can become vulnerable quickly if no one is watching it.

2. Gather the Core Documents

Typical timing: Starts immediately and often continues through the first several weeks.

Collect death certificates, the original will, if any, trust documents, if any, mortgage statements, property tax records, insurance information, utility records, and financial paperwork.

Getting organized early helps reduce confusion and makes later decisions easier.

3. Confirm Who Has Authority

Typical timing: Often begins within the first 1 to 4 weeks from day one, but timing varies by court.

Make sure the family understands who has legal authority to act for the estate before major decisions are made.

Until the authority is clear, families should be cautious about signing contracts, making large commitments, or moving too far along in the sales process.

4. Watch for Immediate Risk Issues

Typical timing: Usually within the first days or weeks if a home is involved.

Look for leaks, plumbing issues, electrical concerns, roof problems, mold, pests, or anything that could worsen if ignored.

Insurance should also be reviewed early, especially if the home may become vacant.

5. Start a Simple Recordkeeping System

Typical timing: Starts immediately.

Keep notes of calls, receipts, property photos, notices, and important account information.

This does not need to be complicated. A simple folder and a running note are often enough to start.

6. Take Basic Inventory Notes

Typical timing: Often within the first several weeks.

Make basic notes about the home, important papers, valuables, and any obvious items the family may need to review later.

The goal is not to complete a full clean-out on day one. It is to avoid rushed decisions and preserve clarity.

7. Keep Utilities and Property Services in View

Typical timing: Usually within the first days or weeks if real estate is involved.

Review utilities, insurance, landscaping, pool service if needed, and other basic services so the property stays stable and protected.

A home does not need to be perfect. It does need to remain secure and maintained.

8. Avoid Rushing Major Decisions

Typical timing: Applies throughout the early stage.

Pause before major renovations, full clean-outs, listing too early, accepting offers too soon, or moving forward before authority is clear.

Probate usually goes better when early action is thoughtful, not rushed.

Final Note

A steady start usually makes probate much easier to manage. Protection, organization, and clarity matter more than speed.

For more probate real estate guidance, visit ProbateInSoCal.com.