Probate Agent

Interview Questions & Disclosure Map

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Serving All California Counties. *We have 90+ Probate Agents working with Gary, regardless of where the estate home is, you have an expert on your side.*

Probate Realtor Interview Checklist (California)

1) Experience & Track Record

1. How many probate sales have you closed in the last 24 months?
2. Which counties do you routinely work in for probate sales?
3. Explain Full vs. Limited Authority and how each changes offer terms and closings?
4. Tell me about a probate deal that went sideways, what happened and how you fixed it?
5. Tell me your probate-vendor partners and can they be paid through escrow?

2) Authority, Timeline & Coordination

1. How will you verify my authority with title/escrow before we accept an offer?
2. What documents will title/escrow require to close?
3. How do you structure timelines to account for the Notice of Proposed Action window?
4. If Limited Authority, how do you prepare buyers for court confirmation/overbid?
5. How will you coordinate with my attorney and the buyer's lender to keep dates aligned?

3) Disclosures & Compliance (CA)

1. Which disclosures are typically exempt in probate - and which are still required?
2. How will you ensure known material facts are disclosed even if the PR never lived in the home?
3. What's you plan for AVID, NHD, LBP, Smoke C/O, Water heater strapping & any HOA items?
4. How do you handle "As-is" condition while keeping buyers confident & protecting the estate net?

4) Pricing, Marketing & Offer Strategy

1. How will you price and position this property against comparable probate & non-probate sales?
2. What's you marketing plan to maximize exposure and qualified offers?
3. How do you keep financed buyers engaged during the NOPA or court-confirmed timeline?
4. What offer terms do you recommend?

5) Communication, Proof & Fees

1. What's your weekly communication cadence & milestone checklist?
2. What proof can you provide, recent probate addresses, testimonials or references?
3. What are your fees and where do they get paid from?
4. Do you carry E&O insurance and how do you manage risk on disclosure-sensitive items?

California Probate Disclosure Map (Quick Reference)

Often exempt: TDS/SPQ when PR never occupied.
Still required: Known material affects, AVID, NHD,LBP if pre 1978, Smoke*/CO, Water heater bracing, NOPA proof/waivers or court order, fiduciary deed, pre-lim

NOPA Planner

Offer Accepted

NOPA Served/Mailed

Objection Deadline

If Limited Authority—Court Confirmation Date

Notes / Coordination with Attorney & Title

Escrow Opened

Notice Window Length (days)

Objections Received (Yes/No)

Pre Listing Prep & Access (Optional Worksheet)

Rekeyed & secured(lockboxplan) Utilities		Insurance verified	
on for showings/inspections Hazard/safety		Yard/cleanup/trashout scheduled	
fixes only (as is otherwise) NHD ordered		Professional photos/video ordered	
HOA/city requirements checked		Lead disclosure if pre 1978	
		Attorney + Title contacts synced	