



INITIAL DISCOVERY QUESTIONS FOR THE EXECUTORS AND
PERSONAL REPRESENTATIVES

1. How many **"court appointed"** Personal Representatives are there?

Single PR _____ CO-PR's: _____

How many official heirs are there? _____

2. Have you **officially** received "Letter of Testamentary" (if there is a will) or "Letter of Administration" (if there was no will)?

3. If so, do you have **a certified copy** of it that you could share?

4. **Were you granted by the court** "Limited Authority" or "Unlimited Authority"?

5. If you have "Limited Authority" when it comes to the estates' **Desired Outcomes** for real estate (exp; to Keep or Sell the property), are you and the heirs **all In Agreement?**

6. Are there: Land Only, Residential Real Estate/Home or Investment Properties that are part of this probate case? What are they:

Do you have paper documentation and addresses for them? yes _____ no _____

7. Have you already done your Call/Publication to Creditors? yes _____ no _____

8. Do any creditors or individuals have any claim against the estate and the real property in particular? yes _____ no _____

What are they? _____

9. Will personal and real estate property have to be liquidated or sold for any tax, past due mortgage or debt purposes? yes _____ no _____

10. Will any proceeds of the sale of the real property need to be distributed to the heirs?
yes _____ no _____

If there was a will, is there a successor / heir entitled to deceased real property? Being “gifted” a property or a residence.
yes_____ no _____

11. Is/are there any **active mortgages** on the real property? yes_____ no _____

Is so, have you already been able to get access to the loan’s information, terms, conditions and pay off’s ? yes_____ no _____

At this time, are there any property taxes or mortgages that are due? yes_____ no _____

I ask this because if there are, we have to act quickly and **avoid potential foreclosure**, which trust me in a market like this one (wherein there is a major lack of inventory), banks and mortgage companies are too quick to cease the property into foreclosure, so we want to make sure we avoid that.

**THE SERVICE AND VALUE THAT WE @ UTAH PROBATE SERVICE
BRING TO YOU AND THE ESTATE:**

1. We **help you do the preliminary collection of all the legal documentation**, necessary for legal sale and transfer of real property.
2. We **connect you with our local Title and Escrow Team** (from the First American Title) to start the work of clearing the tile (seeing if there are any individuals who might have property rights, if there are any issues with the title, and seeing if there are any leans, easements and/or encumbrances against the title).
3. **We help you secure personal and real property** (as state licensed Realtors if you decide to work with us, we then enter into **a fiduciary relationship**, in which **Confidentiality and Reasonable Care** is owed to a client, meaning taking good care of the clients’ funds and the property. By working as clients, we gain that next level or representation on your behalf to insure that the deceased personal and real property are protected during the probate period. For instance: changing the homes’s key locks to prevent intra-familiar as well as random access to the home. And trust me it happens more often than you think that the family members just randomly decide to stop by the deceased’s home and take personal property as a memento.
4. When needed, we **help you organize and even oversee the estate sale**, in order to collect the proceeds.
5. We **connect you to our Preferred Local Vendors** (who can do anything from taking the junk away from the home, to donating personal property to local charities, doing basic groundskeeping and cleaning service work etc).
6. We **help manage the real estate during probate** and connect you to a local crew for the repairs if needed.
7. **We walk though the property with you** “With The Eyes Of A Buyer” and suggest proper home conditioning strategies to make the home is ready for sale and more appealing to

buyers. **So that you can Net The Most Money for you and the estate.** And in case where you are Out Of State PR, we do this on your behalf. That's why having that exclusive seller's agreement in place, is so legally important.

8. If needed by the court, **we arrange for the Pre-listing Appraisal and Home Inspection.**
9. We **gather complete and satisfactory evidence of the Value of the real property** at the time of death.
10. We then do extensive and comprehensive review of market conditions and then **create a detailed PCMA (Probate Comparable Market Analysis)** in order to arrive at the **"Fair Market Value" of the property.** This is the document that you can then present to the judge if the court requires it.
11. We sit down with you and **evaluate your Absolute Desired Needs & Outcomes for the real estate,** and then **go over your interests and options** in determining what's the best course of action (be-it holding on to the property long term as an investment or liquidating it in order to satisfy court's judgments and heirs inheritance).

We **strategize according to 4 Option Principle** based on your Desired Outcomes & what's the most desirable and financially sound in the local real estate market:

#1 Simply CASH OUT

#2 Sell "As Is"

#3 Do Cosmetic Rehab and List on the Market

#4 Keep the property, and Lease it with "The Option To Purchase".

12. We **do all professional Marketing and Promotion** (no out of the pocket expense to you) due at time of closing.
13. We hold **Soft Opening** (only for local investors who are looking for off market deals) and then **Official Open Houses and Viewings** for all of our clients (such as our Buyers in Waiting Program) and the open market.
14. **We assure that all Offer & Sale Contracts are in legal alignment with the court.**
15. And finally, **we assist you with the Final Closing & Sale !**