# Selling an Inherited Home

*A step-by-step document checklist for listing, marketing, and closing on inherited residential property in Alabama.*

**A Note Before You Begin**

We know this checklist is long — and we know you're likely doing this while grieving. You do not need to gather everything at once, and you do not need to do this alone. Red Tails Realty Group will walk each step with you and coordinate directly with your title company.

*This checklist covers real estate and closing documents only. For questions about probate procedure, estate tax elections, or Medicaid estate recovery, we recommend consulting a licensed Alabama probate attorney or CPA — we're glad to provide referrals if you need one.*

**Priority key:** **[NEED NOW]** to get listed · **[BEFORE SHOWINGS]** once we're active · **[BEFORE CLOSING]** for the title attorney

## PHASE 1 — LEGAL AUTHORITY TO SELL

*Before we can list or sign anything, we need to confirm who legally has the authority to act on the estate's behalf. A Power of Attorney ends at death — authority must come from a will, trust, or the probate court.*

- ☐ Certified copy of the death certificate **[NEED NOW]**
  *Request 2–3 certified copies; title and other parties may each need one.*
- ☐ If held in a trust: Certificate of Trust or full trust agreement, plus proof of successor trustee acceptance **[NEED NOW]**
- ☐ If in probate: Letters Testamentary (with a will) or Letters of Administration (no will) **[NEED NOW]**
- ☐ If probate is dependent administration: court order approving the sale/listing **[NEED NOW]**
- ☐ Estate EIN issued by the IRS **[BEFORE CLOSING]**
- ☐ If inherited outside probate: recorded Transfer-on-Death deed, or joint tenancy deed with Affidavit of Death/Heirship **[NEED NOW]**

## PHASE 2 To List & Market the Property

- ☐ Keys, alarm codes, and gate/garage remotes **[NEED NOW]**
- ☐ Most recent property tax bill **[NEED NOW]**
  *Confirms parcel ID and current assessed value.*
- ☐ HOA/condo contact info, current dues, and transfer fee rules (if applicable) **[BEFORE SHOWINGS]**
- ☐ Records or receipts for major updates — roof, HVAC, water heater, windows **[BEFORE SHOWINGS]**

## PHASE 3 For the Title Attorney / Closing

- ☐ Mortgage and/or HELOC statements, with lender contact info **[BEFORE CLOSING]**
  *Needed so title can request an official payoff statement.*
- ☐ Prior title insurance policy or existing deed **[BEFORE CLOSING]**
- ☐ Recent utility bills (water, sewer, gas, electric, trash) **[BEFORE CLOSING]**
  *Confirms no outstanding municipal liens.*
- ☐ HOA estoppel letter, if applicable **[BEFORE CLOSING]**
  *Title requires this — a dues balance alone isn't enough.*
- ☐ Confirmation of Medicaid estate recovery status **[BEFORE CLOSING]**
  *Only relevant if the deceased received Alabama Medicaid long-term care benefits.*
- ☐ Contact info and marital status for all heirs/beneficiaries **[NEED NOW]**
  *Some may need to sign joinder deeds or waivers at closing.*