

VILLAGE ESTATE SALES

REALTOR ESTATE TRANSITION CHECKLIST

A practical guide for identifying transition risks, protecting the listing timeline, and helping families move forward.

FOR REALTORS SERVING THE VILLAGES AND CENTRAL FLORIDA

One Team. One Plan. One Less Thing to Worry About.

VillageEstateSales.com | (352) 942-5823

How to Use This Checklist

Use it during a listing appointment, family consultation, or referral conversation when a home must be cleared before it can be marketed.

THE REALTOR'S ROLE

You do not need to become the family's estate liquidator, mover, appraiser, or cleanout coordinator. Your role is to recognize the risks early, clarify the listing timeline, and connect the family with qualified help before delays become expensive.

Use it early

Complete the first two sections before promising a photography, staging, or listing date.

Protect the relationship

Frame the transition plan as part of your service, not as another burden for the family.

Document decisions

Record who has authority, what must remain, and who approves changes to the property.

Refer before crisis

A transition partner is most effective before deadlines, family conflict, or emergency cleanout costs arise.

THE CONVERSION OPPORTUNITY

When you help solve the belongings problem, you remove one of the largest obstacles between an overwhelmed family and a market-ready home. The Realtor who brings the solution is often remembered long after closing.

1

IDENTIFY THE TRANSITION TRIGGER

Determine why the home must change hands and what is creating urgency.

- ☐ The homeowner is moving to assisted living, memory care, or a smaller residence.
- ☐ The property is part of a probate, trust, or inherited estate.
- ☐ Adult children or decision-makers live outside the area.
- ☐ The home contains decades of belongings or multiple packed storage areas.
- ☐ The family has an expected move, closing, carrying-cost, or insurance deadline.
- ☐ The homeowner is emotionally unable to sort or release possessions without support.
- ☐ The property cannot be photographed, staged, inspected, or shown in its current condition.

- ☐ The family is already discussing dumpsters, donation pickups, or giving everything away quickly.

2 CONFIRM AUTHORITY AND DECISION-MAKERS

Prevent confusion by identifying who can authorize work, sell property, and approve the final plan.

- ☐ Primary decision-maker identified: _____
- ☐ Relationship to owner or estate: _____
- ☐ Best phone and email: _____
- ☐ Legal authority confirmed where applicable (owner, trustee, personal representative, POA).
- ☐ All key family members understand who will make final decisions.
- ☐ An attorney, fiduciary, or executor must approve any part of the transition.
- ☐ The Realtor has permission to introduce a transition partner and share contact information.
- ☐ A process exists for resolving disagreements about items, timing, or access.

IMPORTANT

Do not assume the person with the house key has legal authority to sell belongings or approve property work. When probate, trusts, powers of attorney, or family disputes are involved, encourage the family to confirm authority with the appropriate legal professional.

3 ESTABLISH THE REAL LISTING TIMELINE

Work backward from the desired market date instead of treating cleanout as a final-week task.

- ☐ Desired photography date: _____ Desired list date: _____
- ☐ Required move-out date: _____ Target closing date: _____
- ☐ Time allowed for family selections and heirloom distribution.
- ☐ Time allowed to research and sell valuable items appropriately.
- ☐ Time allowed for an estate sale, auction, buyout, donation, or hybrid liquidation.
- ☐ Time allowed for remaining-item removal and broom-clean completion.

☐ Time allowed for repairs, paint, flooring, landscaping, staging, and photography.

☐ HOA, gate access, parking, sale-sign, or community restrictions have been reviewed.

☐ A contingency plan exists if the family misses a selection or move-out deadline.

4 ASSESS THE CONTENTS BEFORE ANYTHING LEAVES

Protect value and reduce regret by slowing down before dumpsters, giveaways, or bulk donations begin.

☐ Family has identified personal papers, photographs, medications, keys, and documents.

☐ Heirlooms and items promised to family members have been clearly marked.

☐ Jewelry, coins, precious metals, artwork, antiques, collectibles, and memorabilia have been reviewed.

☐ Firearms, vehicles, golf carts, titled property, and regulated items have been identified for proper handling.

☐ Garages, closets, attics, safes, cabinets, sheds, and outdoor areas have been checked.

☐ Potentially valuable items have not been discarded based only on appearance or age.

☐ No unvetted person has been invited to “take what they want” before evaluation.

☐ Items staying with the property are listed in writing for the contract and transition team.

☐ Items excluded from sale or removal are labeled clearly in every room.

VALUE-PROTECTION RULE

Sort first. Evaluate second. Remove last. Families often lose value when they begin with disposal instead of a whole-home assessment.

5 CHOOSE THE RIGHT TRANSITION STRATEGY

The best solution is often a combination of methods rather than a single estate sale or cleanout.

Estate sale

Best when there is enough marketable household inventory, adequate preparation time, and suitable access.

Online auction

Useful for specialty collections, higher-demand items, or categories that benefit from a wider buyer audience.

Buyout May help when speed, privacy, limited inventory, or a firm deadline matters more than retail-style selling.	Donation Appropriate for usable items with limited resale demand, especially after valuables and saleable contents are identified.
Cleanout Removes unsold, damaged, or non-donatable items and prepares the property for the next phase.	Hybrid plan Combines research, sale, auction, buyout, donation, and cleanout to balance value, time, and family needs.

☐ The proposed method matches the amount, condition, and marketability of the contents.

☐ The family understands that not every item has meaningful resale value.

☐ The plan protects the listing schedule while allowing reasonable value recovery.

☐ Costs, commissions, sale proceeds, and remaining-item responsibilities are explained in writing.

☐ The family knows what condition the property will be left in when the work is complete.

6 PREPARE THE PROPERTY FOR MARKET

Define “Realtor ready” before work begins so the final handoff meets expectations.

☐ All personal property to be removed has been cleared from living areas.

☐ Closets, cabinets, garage, lanai, attic access, sheds, and utility areas are addressed.

☐ Remaining fixtures, appliances, remotes, keys, manuals, and access devices are organized.

☐ Trash and non-donatable debris have been removed.

☐ Donation receipts or disposal documentation have been provided when applicable.

☐ Floors are swept or vacuumed and surfaces are left in agreed broom-clean condition.

☐ Exterior items, patio furniture, planters, tools, and yard debris are addressed.

☐ Utilities remain active long enough for cleaning, inspections, repairs, and showings.

☐ Necessary repairs are separated from cosmetic improvements and prioritized by return.

☐ Photography, staging, landscaping, cleaning, and vendor access are scheduled in sequence.

7 PROTECT THE CLIENT EXPERIENCE

A strong referral partner should make the Realtor look organized, responsive, and trustworthy.

- ☐ Family receives one clear point of contact for the transition.
- ☐ Realtor receives agreed progress updates without needing to manage daily operations.
- ☐ Access, keys, gate codes, alarms, and vendor schedules are documented.
- ☐ Valuable or sensitive discoveries are reported promptly to the authorized decision-maker.
- ☐ The home is secured after workdays, sales, pickups, and cleanout activity.
- ☐ Neighbors, HOA requirements, parking, and community rules are handled professionally.
- ☐ Scope changes, unexpected costs, or timeline risks are communicated before action is taken.
- ☐ Final walkthrough occurs before photography or the listing goes live.

Realtor Red Flags

These warning signs suggest the transition may delay the listing or expose the family to avoidable loss.

“We will sort it next weekend.” Repeated delays usually indicate emotional overwhelm, family conflict, or an unrealistic workload.	Several relatives are taking items independently. Uncontrolled removal can create disputes, missing valuables, and uncertainty about what conveys.
A dumpster is arriving before an evaluation. Potentially valuable property may be discarded, and the family may later regret rushed decisions.	No one knows who is legally in charge. Work, sales, and access can be challenged when authority has not been confirmed.
The list date is less than two weeks away. Estate work, donations, repairs, cleaning, and photography may compete for the same limited window.	The family expects every item to sell. Unrealistic value expectations can stop progress and create dissatisfaction with any provider.
The home is occupied during the transition. Safety, privacy, access, medication, pets, and daily-living needs require a more careful plan.	The Realtor is becoming the project manager. Coordinating removals, family decisions, cleaners, haulers, and buyers can consume time and increase liability.

WHEN TO MAKE THE INTRODUCTION

Refer a transition specialist as soon as you recognize that belongings, family logistics, or property condition could control the listing date. Early introductions give the family more options and usually produce a calmer, more

valuable outcome.

Questions to Ask a Transition Partner

Use these questions before trusting someone with your client relationship and a future listing.

- ☐ Will you provide a written scope, timeline, responsibilities, and fee structure?
- ☐ How do you identify potentially valuable items before disposal or donation?
- ☐ Which selling methods do you use, and how do you decide between them?
- ☐ Who manages buyer access, security, parking, and community requirements?
- ☐ How will you communicate progress to the family and Realtor?
- ☐ What happens to items that do not sell?
- ☐ Do you coordinate donations, cleanout, and broom-clean completion?
- ☐ Can you work with out-of-state families, trustees, executors, and attorneys?
- ☐ How do you handle changes in schedule, scope, or family instructions?
- ☐ What insurance, agreements, and safeguards protect the client and property?
- ☐ Can you provide references or examples involving Realtor-directed transitions?
- ☐ Will you protect my relationship and return the client to me for the real estate transaction?

Estate Transition Referral Worksheet

Complete this page before making an introduction. It helps the transition team respond quickly and protects the listing timeline.

REFERRAL DETAIL	NOTES
Property address	
Homeowner / estate name	
Primary decision-maker	
Phone / email	
Legal role or authority	
Current occupancy	Occupied / Vacant / Partially occupied
Reason for transition	Downsizing / Senior living / Probate / Inherited home / Other
Family location	Local / Out of state / Multiple locations
Desired move-out date	
Desired photography date	
Desired list date	
Known high-value categories	
Items that must remain	
HOA or access restrictions	
Primary concern	Timeline / Value / Family conflict / Cost / Distance / Other

SUGGESTED INTRODUCTION

"I work with Village Estate Sales when a family needs help preparing a home for market. They can evaluate the contents, create a transition plan, coordinate the sale and removal process, and help return the property ready for its next step. I would be glad to introduce you."

A Better Client Experience Starts Before the Listing

The right transition plan protects the family, the property, and your reputation.

Discover & Maximize Identify important belongings and choose the best path for valuables, household contents, donations, and family selections.	Market & Sell Prepare, promote, and manage the appropriate estate sale, auction, buyout, or blended selling strategy.
Clear & Complete Coordinate remaining-item removal, donations, cleanout, and the final property handoff.	Realtor Ready Help return the property in the agreed condition so your team can move into repairs, staging, photography, and listing.

PARTNER WITH VILLAGE ESTATE SALES

We help Realtors turn complicated estate situations into clear, coordinated transitions - without asking the Realtor to manage the contents, buyers, donations, or cleanout.

Schedule a Realtor Partnership Conversation

(352) 942-5823 | VillageEstateSales.com/realtor-ready-program

You Don't Have to Figure It Out Alone.

Professional note: This checklist is an educational planning resource and is not legal, tax, appraisal, insurance, or real estate brokerage advice. Parties should consult appropriately licensed professionals for their circumstances.