Arizona Probate Home Sale Checklist

For personal representatives, heirs and families selling an inherited home in Greater Phoenix.
Prepared by Mary Levendi, CPRES, SRES® · Levendi Realty at RE/MAX Fine Properties.

1. The first week

- ☐ Change or rekey the locks; collect every key, garage remote and gate code.
- ☐ Call the homeowner's insurance company. Ask whether a vacant home needs a different policy.
- ☐ Keep power, water and A/C running. Arizona heat can damage a closed-up house quickly.
- ☐ Forward mail, stop deliveries and keep the yard tidy so the home doesn't look empty.
- ☐ Photograph each room before anything is moved, and secure jewelry, papers and valuables.
- ☐ Contact the mortgage servicer. If there is a reverse mortgage, call right away; lenders set deadlines after a death.

2. Talk with an Arizona probate attorney

- ☐ Confirm who will serve as personal representative and get certified copies of the letters once issued.
- ☐ Ask whether the probate is informal or supervised, and whether the letters restrict real estate sales.
- ☐ Ask whether the home is held in a living trust (the successor trustee may sell without probate court).
- ☐ Ask whether a small estate affidavit could apply (Arizona real property under $300,000 after liens, filed at least six months after death).

3. Documents to gather

- ☐ Certified death certificates, the will or trust, and the court letters.
- ☐ Deed, most recent property tax bill, and any HOA contact, dues and rules.
- ☐ Mortgage, home equity line or reverse mortgage statements.
- ☐ Insurance policy, utility accounts, and any warranties, permits or repair records for the home.

4. Value and decide

- ☐ Get a comparative market analysis based on recent nearby sales and the home's condition.
- ☐ Ask your attorney or CPA whether you need a date-of-death appraisal from a licensed appraiser.
- ☐ Share the same numbers with every heir: sell, keep, or buy out a sibling.
- ☐ Compare likely net proceeds for selling as-is versus a cleanout and light refresh.

5. Prepare the home

- ☐ Let family members set aside keepsakes first.
- ☐ Schedule an estate sale, donation pickup or cleanout crew for the rest.
- ☐ Handle safety items and any repairs that are likely to pay for themselves.
- ☐ Deep clean, refresh landscaping, and service the pool and A/C if there is one.

6. Listing to closing

- ☐ The personal representative (or successor trustee) signs the listing agreement for the estate.
- ☐ Review offers on price, terms and certainty of closing.
- ☐ If the probate is supervised or the letters are restricted, get court approval before closing.
- ☐ Give the title company the letters and death certificate early to avoid delays.
- ☐ At closing, the mortgage, liens and costs are paid; the rest goes to the estate account.

Good to know in Arizona: Creditors have four months to file claims, so most informal probates take about six to eight months to close. The home can often be listed well before then. In most informal probates, a personal representative with unrestricted letters can sell without a court hearing.

Questions about an inherited home? Talk with Mary.

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