Inherited Home Center

The executor's home-sale checklist

This checklist follows a home sale from start to finish for an executor or personal representative. It starts with confirming your authority to sell and ends with closing and keeping records for the estate. Confirm each step with the estate's attorney.

Last reviewed: November 17, 2026 by Wendy Atherton

Online version: https://inheritedhomecenter.com/checklists/executor-home-sale/

Confirm your authority

- ☐ Get the court papers that show you can act for the estate, such as letters testamentary or letters of administration.
  If the house is in a living trust, the successor trustee uses the trust documents instead.
- ☐ Ask the estate's attorney whether the will gives you power to sell, and whether your state requires court approval.
  See the rules for your state in our state guides.
- ☐ If there are co-executors, agree on how you'll make decisions and sign papers.

Protect the house

- ☐ Confirm the house is insured, and tell the insurer if it's empty.
- ☐ Keep the property taxes, insurance and any mortgage current.
- ☐ Ask the estate's attorney or CPA about setting up an estate bank account, and pay house costs from it.
- ☐ Keep receipts for everything spent on the house.

Learn what it's worth

- ☐ Get a value as of the date of death, such as an appraisal.
  This is often used for the stepped-up tax basis. Ask a tax professional what you need.
- ☐ Ask a local agent for a market analysis of what the house could sell for now.
- ☐ Get a payoff figure from any mortgage or reverse mortgage servicer.

Agree on a plan

- ☐ Share the numbers with every heir. Our sale calculator can help everyone see the same estimate.

- [ ] Talk through the options, including whether an heir wants to buy the house.
- [ ] Write down what was decided and who agreed.

Prepare and list

- [ ] Clear out belongings after the heirs have agreed on personal items.
- [ ] Make only the repairs that make sense for the price. Ask your agent.
- [ ] Choose an agent who has sold estate or probate homes.
- [ ] Ask your agent and the estate's attorney which seller disclosures apply. Rules differ by state.

Offers and closing

- [ ] Review offers with your agent and, if needed, the estate's attorney.
- [ ] Get court approval before closing if your state or the court requires it.
- [ ] Give the title company the papers that show your authority.
- [ ] Sign the closing papers as executor or personal representative, not in your own name.

After closing

- [ ] Deposit the sale money into the estate account.
- [ ] Keep the closing statement for the estate's records and the tax preparer.
- [ ] Pay estate debts and distribute money to heirs only as the estate's attorney advises.

Inherited Home Center is an educational resource. We are not a law firm, CPA or financial advisor, and nothing here is legal, tax or financial advice. Rules vary by state and change often. Talk with a licensed attorney or tax professional about your situation.

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