

PRE-PROBATE CHECKLIST

A Simple Guide for Families Facing an Inherited Home

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Documents to Gather

- Death certificate (multiple copies)
- Property deed
- Will or trust documents
- Mortgage statements
- Homeowners insurance policy
- Utility and tax bills

Things to Avoid Early On

- Canceling insurance
- Removing major fixtures
- Giving away valuables prematurely
- Assuming probate is required
- Ignoring maintenance or security