



## Executor's 7-Point Valuation Checklist

*Gather these items before your probate appraisal*

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1. Confirm the Effective Date: Secure a certified copy of the death certificate or court-approved date of death. This anchors the appraisal's value date.
2. Ownership & Legal Description: Provide the latest deed, legal description, and parcel ID/tax map. These verify exactly what's being appraised.
3. Property Basics: Exact street address, estimated square footage, bedroom/bath count, plus any recent survey or floor-plan sketch if available.
4. Improvements & Repairs: A list of upgrades, renovations, or major repairs, if available — with dates and approximate costs.
5. Prior Valuations & Sale Info: Copies of previous appraisals, MLS listings, or tax assessments for context and historical reference. If this is not available that's fine, we can still proceed.
6. Access & Utilities: Keys, alarm codes, and status of utilities (on/off). Note occupancy or tenant arrangements.
7. Special Circumstances: Disclose easements, leases, liens, environmental issues, or pending litigation that could affect value.