



# PROBATE & TRUST REAL ESTATE SALES GUIDE

Options For When You Need Them Most







Choosing the right realtor is one of the most important decisions you'll make when selling your property, and it can mean the difference between a stressful process and a seamless experience. That's why it's crucial to select an agent with proven expertise and a track record of success. I have extensive experience guiding sellers through the complexities of real estate transactions, ensuring all steps are clear and manageable. My clients consistently provide glowing referrals and reviews because they trust me to deliver results with professionalism and care.

Beyond experience, I bring unparalleled local market knowledge, giving you the confidence that your property is priced and marketed strategically to attract the right buyers. I provide a clear plan of action from day one, outlining every step of the process, from pricing to marketing and closing. My goal is to make your selling experience as stress-free as possible, handling all paperwork, negotiations, and approvals so you can focus on what matters most. Additionally, I pride myself on being highly available and responsive, ensuring you're never left waiting for answers or support. With my skills, dedication, and client-first approach, I'm confident I'm the best realtor to help you achieve your goals. Let's work together to make your sale a success.



**HOMESMART**  
I CARE REALTY



# TERMINOLOGY



**Letters Of Administration**-A Court document establishing the authority of an individual or entity to act on behalf of the estate.

**Estate**-A persons total possessions/assets managed by a Fiduciary, subject to a court order.

**Fiduciary**-A person or organization who manages property with legal responsibility involving a high level of care.

**Certified Copy**-An official copy of documents from a court case file with the official stamp or seal on the certified copy.

**Trustee**-The person named in a trust who will manage the property in the trust and distribute income and assets.

**Trustor**-The person who transfers assets into a trust for the benefit of another (a.k.a. "Grantor").

**Successor Trustee**-Alternate Trustee who will act if the first Trustee(s) are unable or unwilling to act as Trustee.

**Testator**-The person who makes a will.

**Administrator**-The trustee is a neutral third party who oversees the sale of the property.



## Additional Terminology

<https://www.placer.courts.ca.gov/sites/default/files/probate-glossary-public.pdf>

If there are any terms which you do not fully understand, please ask me. It is my goal to ensure your understanding and there is no question too small or silly. Possessing a thorough understanding of the process will help you navigate to a resolution which you are comfortable with and understand.







# IMPORTANT THINGS TO CONSIDER



In California, selling a home during probate involves a court-supervised process to ensure the property is distributed according to the deceased's will or state law if no will exists. The executor or administrator of the estate typically obtains court approval before listing the property for sale. Once an offer is accepted, a notice of proposed action is sent to beneficiaries, who have 15 days to object. In some cases, a court hearing is required to confirm the sale, during which competitive bidding may occur to ensure the best price. The court must approve the final sale, and proceeds are distributed to pay off debts and beneficiaries as outlined in the probate process.



## Independent Administration of Estates Act

If the Administrator of the Estate is granted full authority under the IAEA by the court, they may be able to administer most matters of the probate estate without court supervision.

## Date of Death Appraisal

Most Administrators and Trustees will obtain a Date of Death Appraisal to establish a value for the home as of the date of death. This can be done to determine value retroactively.



## Limited Disclosures

Many Administrators and Trustees have never occupied the home they are selling and therefore have limited knowledge of the home. Generally there are fewer required seller disclosures due to this factor.



# IMPORTANT THINGS TO CONSIDER



## Repairs and Updates

Making repairs may not always be practice or necessary when selling a home from probate or a trust. Homes sell for more when in good condition and presentable. Ask me how to get repairs done without the hassle of up-front costs.

## Everything Else

Do you need to empty the home, sell property or have junk removed? Do you live out of the state or the area and Need someone to handle everything for you? Ask me how I can take care of these things and more for you.



### **\*\*Legal Disclaimer:\*\***

**The information provided is for informational purposes only and should not be construed as legal advice. This information is not a substitute for professional legal counsel. Always seek the advice of a qualified legal professional to address your individual needs and concerns.**





# WHAT TO EXPECT WITH ME



## Specialized Knowledge:

- Expertise in probate and trust sales, including familiarity with court procedures, required paperwork, and legal requirements.
- Understanding of state-specific probate laws and how to navigate unique challenges (e.g., delays, heir disputes).

## Compassion and Patience:

- Sensitivity to the emotional dynamics of selling an inherited property or handling disputes among heirs.

## Organizational Ability:

- Skill in managing deadlines, legal documents, and multiple stakeholders (attorneys, heirs, and courts).

## Proven Track Record:

- Experience with similar transactions, including testimonials from clients in probate or trust situations.

## Marketing and Pricing Expertise:

- Ability to market the home effectively to attract buyers quickly while ensuring compliance with any court-mandated appraisals or valuations.

## Problem-Solving Skills:

- A proactive approach to resolving issues such as liens, property title complications, or repairs often associated with estate properties.

## Strong Communication Skills:

- Clear, transparent updates throughout the process.
- Empathy and professionalism when discussing sensitive topics.



We were fortunate to connect with Natalie Banning for the purchase of our rental property. We live out of the area and Natalie made the process so easy. She is professional, knowledgeable and kept us informed every step of the way. We highly recommend her for your real estate needs.



OMG I really enjoyed working with Natalie! There's so much to recommend — she's friendly, helpful, communicative, straightforward, professional — all while sharing her expertise and knowledge of the Rocklin area. These are very important qualities in the sale of any house, but especially in this instance because I was selling the house of a family member, while living on the opposite coast. I trusted her recommendations and guidance in getting the house ready for sale and know that we did our best for the next homeowners.

## GET YOUR ANSWERS TODAY

**Natalie Banning | Realtor**

**916-577-0699**

**BanningRealEstate@gmail.com**

**www.PlacerCountyRealEstateListings.com**

DRE#01723348





# PAST PERFORMANCE



## Unparalleled Marketing

- Professional Photography
- Aerial Videography
- Matterport 3D Tour
- Virtual Floorplan
- Custom Video Marketing
- Virtual Staging
- Professional Staging
- Custom Webpages
- Social Media Marketing
- Text & QR Codes



**\$570,000** ~~\$570,000~~  
2256 Provincetown Way, Roseville, CA 95747



**\$595,000** ~~\$595,000~~  
5556 Riverwood CT, Rocklin, CA 95677



**\$795,000** ~~\$785,000~~ ▲ 1.3%  
8275 Locust RD, Elverta, CA 95626



**\$690,000** ~~\$630,000~~ ▲ 9.5%  
2700 Rustic Oak CT, Rocklin, CA 95677



**\$365,000** ~~\$355,000~~ ▲ 2.8%  
7006 Rio Linda BLVD, Rio Linda, CA 95673



**\$475,000** ~~\$475,000~~  
5024 North AVE, Carmichael, CA 95608



**\$550,000** ~~\$545,000~~ ▲ 0.9%  
5791 Summit DR, Rocklin, CA 95765



**\$675,000** ~~\$674,900~~  
6289 Mystic WAY, Roseville, CA 95747





## NEXT STEPS



### **Gather Your Documents**

Collect any Trust documents and court papers you may have. If you don't have any documents, that's ok and I can still help you.

### **Download The Vendor List**

The Vendors List on my website has many helpful resources. I have included professionals who my Clients or I have had a pleasant experience with.

**Text VENDORS to 916-226-6868**

### **Request Your Homes Value**

You can find out how much the property could sell for by requesting your home's value. It's easy and only takes a few minutes.

**Text VALUE to 916-226-6868**

### **Contact Me Today**

Let's get you started in the right direction! Please call or text me anytime to evaluate your situation and discuss all of your questions.

**Natalie Banning | Realtor**

**916-577-0699**

**BanningRealEstate@gmail.com**

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