

Probate Lead Sheet

Today's Date: _____ Case # (C#): _____ Filing Date: _____ Court House: _____

Personal Representatives Contact Information

PR1 Name: _____
Relationship: _____
Email: _____
Cell: _____
Phone: _____
Address: _____

PR2 Name: _____
Relationship: _____
Email: _____
Cell: _____
Phone: _____
Address: _____

[] Heir - [] Attorney - [] Other _____
Authority: [] Full, [] Limited

[] Heir - [] Attorney - [] Other _____
Bond: [] Without, [] With

Estate Information

The Estate of: (Decedent Name = DN): _____ DOD: _____

Real Property Address 1: _____ Address 2: _____

Real Property 1 Value: _____ Real Property 2 Value: _____

Zestimate Value: _____ Zestimate Value: _____

Personal Property Value: _____ Debt: _____

Additional Heirs

Heir Name: _____
Relationship: _____
Email: _____
Cell: _____
Phone: _____
Address: _____

Heir Name: _____
Relationship: _____
Email: _____
Cell: _____
Phone: _____
Address: _____

Attorney's Information

Attorney Name: _____ Address: _____

Email: _____

Phone Number: _____ Fax Number: _____

Phone Call

- Hello may I speak with (PR _____) please?
- Hello, my name is Zach Fletcher with the Saenger Group at Keller Williams Capital Properties, the reason for my call is that I understand there is a property associated with Probate Case Number: (C#) _____ and you are in charge of the estate, is that correct?
- Could you tell me, is the estate planning to liquidate the real property, keep it for a family member, or turn it into a rental? ... Ok, great!
- As I mentioned, my name is Zach Fletcher, and our team works with many Personal Representatives, Executors and Administrators helping them with the sale of real property held by an estate. We have Certified Probate Real Estate Specialists on our team here in Maryland and you can learn more about our team at USProbateCourt.com.
- As you decide how to handle the real property in the estate, would it be helpful if we were to provide you with a market study of what the property could sell or rent for?

House

Could you tell me a little about the house? _____

Stories/Levels: _____ Bedrooms: _____ Baths: _____ Full, _____ Half SqFt: _____

What improvements have been done to the house in the last 5 years? _____

Does it have a Pool? [] Yes, [] No

Rate your house on a scale from 1-10, where 1 is it is a tear down, and 10 is it is a perfect model home: _____

What would make it a 10? _____

Financials

How much is owed on the property? 1st \$ _____ 2nd \$ _____ LOC \$ _____

How much do you think the house is worth? \$ _____

How much do you want to list the house for? \$ _____

What price won't you go below? \$ _____

Is the estate up to date on all payments? [] Yes, [] No

Is the property solely owned by the Estate? [] Yes, [] No

If not, who else is on the title? _____

Are there any other properties in the estate that will need to be sold locally, or in another state?

Conversation

What are the 3 things you expect from your Certified Probate Real Estate Specialist when selling the property?

1) _____

2) _____

3) _____

Are you setting other appointments? [] Yes, [] No

If yes, with whom and when? _____

On a scale from 1-10, when it comes to tough questions, how honest and frank do you want me to be with you?

Property Visit Appointment: Date: _____ Time: _____

Office Visit Appointment: Date: _____ Time: _____

Date	Time	Notes	Next Step