DISTILLED
TITLE COMPANY

Inherited Property & Estate Sale Checklist

Selling a home after someone passes away takes a few extra documents. Send what you have as early as possible. The right paperwork depends on the situation, and we will tell you exactly what applies.

Gather what you can

- [ ] A copy of the death certificate for the owner(s) who passed away
- [ ] The will, if there is one
- [ ] If a probate case was opened: the court case number and the order appointing the executor or administrator
- [ ] Names and contact information for all heirs, and whether any are minors or have passed away
- [ ] If the home was held in a trust: the trust agreement or certificate of trust and the successor trustee's name
- [ ] Any mortgage, home equity line or lien still on the property, and the lender's contact information

What we will help sort out

- [ ] Who has the authority to sign the deed: an executor or administrator, a trustee, or all of the heirs
- [ ] Whether documents such as an affidavit of descent need to be recorded before the sale
- [ ] Whether a court order or other approval is needed before closing
- [ ] How sale proceeds will be paid, and to whom

Distilled Title does not give legal or tax advice. An estate attorney can advise on probate questions, and our Chief Executive Officer and General Counsel can explain what title requires.
Questions? Call Lexington (859) 500-1206 or Elizabethtown (270) 215-4506.

We never send new or changed wiring instructions by email.