



THE
Schwaegerle
Team

The Schwaegerle Team's Seller Guide to the Probate Process

Helping you navigate every step with clarity, care, and confidence.

The Schwaegerle Real Estate Team | 02040597 & 02107467 | 805-215-5063 | 3591

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What Is Probate?

Probate is the court-supervised legal process required when a property owner passes away without a trust or transfer-on-death deed. It ensures debts are paid and assets are properly distributed.



Court Supervision

The court oversees the administration of the estate to ensure legal compliance.



Asset Distribution

Real estate must be appraised, marketed, and sold under specific legal guidelines.

While it can feel overwhelming, the right team makes the process manageable and smooth.

The Process: Getting Started

The probate journey begins with two critical administrative steps.



1. Appointment of Executor

A personal representative is appointed to manage the estate. This is the Executor (if named in a will) or Administrator (if not).



2. Property Valuation

The court requires a probate referee to determine the fair market value of the real estate assets.



The Process: The Sale

Once the estate is established, we move to the marketing and transaction phase.



3. Listing

With court approval, we prepare the property, set a pricing strategy, and launch marketing efforts.



4. Offers & Confirmation

Buyers may need to wait for court confirmation, where other buyers might bid at a hearing.



5. Closing

Escrow closes, proceeds enter the estate, and debts or beneficiaries are paid per court instructions.

Common Seller Concerns

Probate sales differ from standard transactions. We help you anticipate these unique challenges.



Timeline

Sales often take longer than standard transactions due to court schedules. Picture 3-6 months instead of 1-3.



Control

Executors must follow strict probate rules and cannot always make quick decisions.



As-Is Sales

Most sales are "as-is," reducing repair needs but requiring strategic pricing.



Oversight

Transparency is mandatory, requiring open reporting and compliance at every step.

How We Help: Preparation & Strategy

We bring education and expertise to position your property for success.



Guidance from Day One

As Certified Probate and Trust Specialists, we explain the process in plain language so you know exactly what to expect.



Strategic Valuations

We run a Broker Price Opinion (BPO) alongside the probate referee's valuation to ensure competitive positioning.



Pre-Inspection Reports

We pay for home and pest inspections upfront to discover issues and find serious buyers for an "as-is" sale.



How We Help: Execution & Support

From marketing to the courtroom, we handle the heavy lifting.

Full-Service Marketing

Professional photos and targeted online exposure ensure the property reaches the widest audience.

Court Process Support

We prepare disclosures and communicate closely with probate attorneys to keep the transaction on track.

Negotiation & Oversight

We manage offers and coordinate the court confirmation process so you don't have to stress.

Tenant and Occupant Communication

We communicate with tenants and occupants on your behalf for all showings so you don't have to.



Specialized Expertise

Local Experience

As Cal Poly alumni and third-generation real estate brokers and investors, we leverage deep market knowledge and community connections to get your property sold.

Complex Situations

We are experienced in handling tricky tenant situations, properties with significant deferred maintenance, and coordinating with multiple principals to reach a successful outcome for the estate.

Our Mission

We know probate sales can come at a time of grief and transition. Our mission is to make this process as seamless as possible, giving you peace of mind while protecting the estate's financial outcome.



Next Steps

If you or your family are facing the sale of a probate property, we are here to help.

1 Contact Us

Reach out for a confidential consultation regarding your situation.

2 Get an Analysis

We'll provide a personalized market analysis and walk you through your specific timeline.

3 Craft a Plan

Together with your attorney, we'll build a strategy to sell efficiently for maximum value.

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