



Greenways Realty

North Carolina Executors: Your Probate Property Checklist

The step-by-step guide to handling a loved one's home—without confusion, conflict, or costly delays.

Navigate the probate process without legal guesswork or family drama.

INSTRUCTIONS:

If you've been named the **executor** of a loved one's estate, this checklist will help you understand exactly what to do with their property — and in what order.

Here's how to use it:

1. Go through each step in the checklist — even if you're not ready to sell yet.
2. Mark what's already completed and what still needs attention.
3. Share it with family members or co-heirs to keep everyone on the same page.
4. When you're ready, use the plan to move forward **calmly and confidently**.

THE GUIDE (10 Key Steps):

1. Locate the Will and Court Documents

Confirm who's legally authorized to make decisions about the property.

2. Open the Estate With the Court

File probate paperwork with the county clerk so the estate can officially transfer assets.

3. Identify the Property's Current Ownership Status

Determine if the home is in the deceased's name, a trust, or joint ownership.

4. Secure and Maintain the Property

Change locks, forward mail, and ensure utilities and insurance are current.

5. Gather Financial Information

List out all debts, liens, mortgages, and taxes tied to the property.

6. Communicate With All Heirs Early

Avoid conflict by keeping everyone informed and documenting every step.

7. Determine If and When the Property Can Be Sold

You may need court approval before listing — this step explains how to verify.

8. Prepare the Home for Sale or Valuation

Coordinate cleanouts, appraisals, or inspections to assess value accurately.

9. Handle Offers and Closing Documents

Understand what approvals you'll need before signing contracts.

10. Distribute Proceeds According to the Will

After sale or transfer, ensure funds are correctly disbursed to heirs.

WHY THIS IS IMPORTANT:

Most executors are thrust into the role unexpectedly — and a single mistake can delay probate for months or even years.

This checklist simplifies every step so you can protect the estate, keep the family informed, and move forward without legal confusion or emotional chaos.

Need help figuring out your next step?

We help North Carolina executors navigate probate properties with ease — from first filing to final sale.

Schedule Your
Free Probate Strategy Call

<https://greenwaysrealty.com>

You don't have to do this alone. Let's make a clear plan—together.