



The Real Estate Agent's Probate Referral Checklist

A guide to identifying probate sales, gathering key information, and confidently serving your clients by partnering with a specialist.

Step 1: Identify the Situation (Key Red Flags)

If your client answers "yes" or "I don't know" to any of these, it's a sign a probate specialist may be needed:

- Is the property owner on title deceased?
- Has a court officially appointed a Personal Representative (Executor/Administrator) for the estate?
- Is the sale being supervised or required by the court?
- Are there multiple heirs or beneficiaries who need to agree on the sale?

Step 2: Gather Key Information

Asking these questions helps you understand the situation and allows for a smooth referral process. This makes you look professional and prepared.

- What is the name and contact information for the court-appointed Personal Representative?
- Is there an attorney representing the estate? If so, what is their name and contact information?
- What is the address of the property to be sold?
- Are there any known issues with the property (deferred maintenance, occupancy, etc.)?

Step 3: Our Partnership Promise to You

When you refer a client, you are trusting us with your reputation. We honor that trust with three core commitments:

- **You Remain the Trusted Advisor:** Your client relationship is protected. We act as your operational partner, providing expertise while you maintain the primary connection.
- **Seamless Communication:** You will receive regular, simple updates from us that you can easily share with your client, keeping everyone informed and confident.
- **A Guaranteed Referral Fee:** We formalize every partnership with a standard referral agreement. You are compensated for your trust upon the successful close of escrow.

Ready to Partner or Have Questions?

I am always available to discuss a potential case, answer your questions, or provide guidance. Let's connect.

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Submit a Referral Online: curtismcdaniel.com/resources