THOMAS HORN
REAL ESTATE APPRAISER

Executor's 7-Point Valuation Checklist

Gather these items before your probate appraisal

1. **Confirm the Effective Date:** Secure a certified copy of the death certificate or court-approved date of death. This anchors the appraisal's value date.
2. **Ownership & Legal Description:** Provide the latest deed, legal description, and parcel ID/tax map. These verify exactly what's being appraised.
3. **Property Basics:** Exact street address, estimated square footage, bedroom/bath count, plus any recent survey or floor-plan sketch if available.
4. **Improvements & Repairs:** A list of upgrades, renovations, or major repairs, if available — with dates and approximate costs.
5. **Prior Valuations & Sale Info:** Copies of previous appraisals, MLS listings, or tax assessments for context and historical reference. If this is not available that's fine, we can still proceed.
6. **Access & Utilities:** Keys, alarm codes, and status of utilities (on/off). Note occupancy or tenant arrangements.
7. **Special Circumstances:** Disclose easements, leases, liens, environmental issues, or pending litigation that could affect value.

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