

MORENO WORK GROUP
REAL ESTATE SERVICES

California Probate Real Estate Experts

FOR ATTORNEYS
FOR EXECUTORS & ADMINISTRATORS

Navigating the Probate Real Estate Process with Confidence

We help to remove the
” OVERWHELM”
in the Probate Process.

Empathy & Support During a Difficult Time

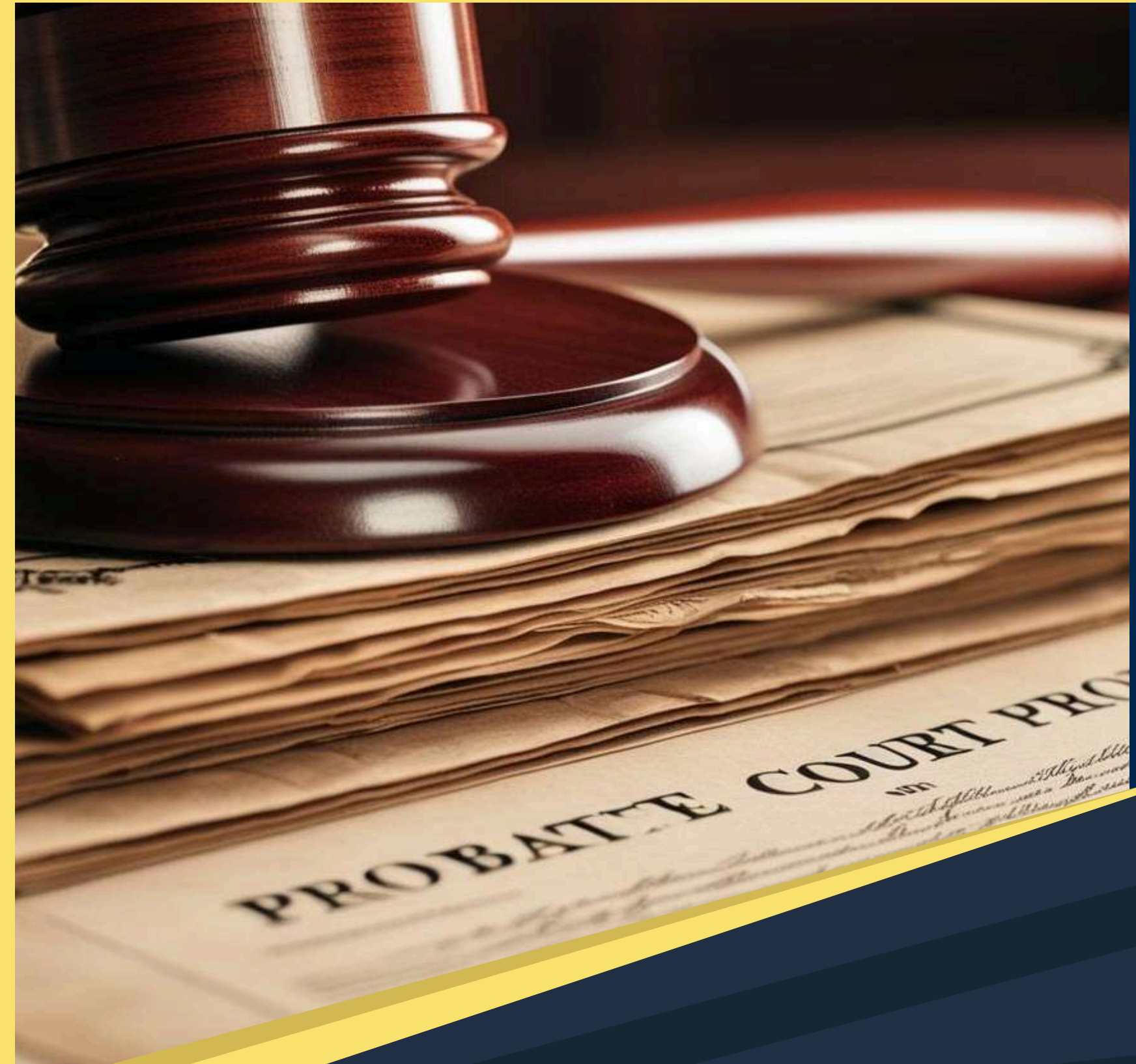
During a time of grief and loss, Executors and Administrators often find the probate process overwhelming, as managing and coordinating inherited properties can be both time-consuming and stressful.

Let us help take this burden off your shoulders.

At Moreno Work Group, we specialize in probate real estate, guiding administrators and executors through the complexities of selling estate properties efficiently and with minimal stress.

How would it feel to have an expert handle this for you?

Imagine a seamless probate property sale where all legal, financial, and logistical aspects are handled, allowing you to move forward without stress or confusion.



Moreno Work Group Real Estate Services 650-773-3628

Helping with aspects of the real estate probate process to seamlessly settle your estate is what we do with excellence. We have a team of professional resources to assist in handling any work issues that we may have to handle with your real estate during the probate process. We are asking for the opportunity to put them to work for you.

Our Team Includes:

- Estate Sales
 - Appraiser
- House Cleaners
 - Locksmith
- Hauling service
- Cleaning service
- Handyman Repairs
 - Contractors
- Home Inspectors
- Termite Inspectors
- Real Estate Negotiators



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How We Help Executors & Administrators

- Complete Home Valuation & Retrospective Analysis
- Property Preparation & Staging if required
- Seamless Collaboration with Attorneys
- Strategic Marketing & Exposure to Buyers
- Communication & Transparency Throughout the Process
- Quick Sale Options (Including Investor Offers Within 30 Days)

Selling a probate property does not have to be stressful. We have helped many executors and administrators maximize profits while minimizing stress.



Understanding the role of Executor & Administrator

As an executor or administrator, your responsibilities include:

- Reading the Will
- Safeguarding the Estate Assets
- Petitioning the Court for Probate
- Assembling and Inventorying Assets
- Procuring Appraisals of All Assets
- Administering the Estate
- Making all Tax Returns
- Settling Claims Against the Estate
- Distributing Probate Assets
- Obtaining Final Discharge



Duties of the Estate Executor During the Probate Process

- Reads the Will

The executor reviews the will, expedites burial instructions, and meets with family members and interested parties to provide guidance. They also consult with the attorney who drafted the will and those familiar with the deceased's financial affairs.

- Safeguards the Estate's Assets

Immediate protective measures are taken to secure assets before formal appointment as executor. This includes ensuring proper insurance coverage, protecting real and personal property, and overseeing any ongoing business interests.

- Assembles and Inventories All Assets

The executor examines financial records, books, and files of the deceased to create an inventory of assets.

- Petitions the Court for Probate of the Will

The executor works with an attorney to obtain proof of heirship, locate witnesses, and petition the court for probate. They notify financial institutions, collect life insurance proceeds, secure tax waivers, and inventory valuable assets. Additionally, they manage real estate holdings, oversee leases and mortgages, and ensure business interests are properly handled.



cont...Duties of the Estate Executor

- Procures Appraisals of All Assets

The executor arranges for professional appraisals to determine the value of assets as of the date of death, which is essential for tax and distribution purposes.

- Administers the Estate

Following the will's directives and probate law, the executor determines the best course of action for valuable collections, real estate, and business interests. They assess market conditions, decide on asset sales, and ensure enough cash is available to cover taxes, debts, and expenses while preserving the estate's value for distribution.

- Makes All Tax Returns

The executor files all necessary federal and state tax returns, including inheritance, estate, and income taxes. They also handle tax obligations for the year prior to death, secure waivers for property transfers, and ensure compliance with tax authorities.

- Settles All Proper Claims

Creditors are notified, and the executor reviews and settles valid claims against the estate. They also resist improper claims and ensure all tax liabilities are paid before distributing assets to heirs.



cont...Duties of the Estate Executor

- Distributes the Probate Estate

After settling debts and obtaining court approval, the executor prepares final accounting documents and distributes the remaining estate according to the will and court orders.

- Obtains Final Discharge

Once all obligations are met and assets are distributed, the executor files for final discharge, officially concluding their role in managing the estate.



The Probate Timeline

Prepare and File Petition for Probate	1-2 months
Court hearing on the Petition for Probate	2-3 months
The following are issued: Letters of Administration, Orders for Probate, Duties and Liabilities, Issue Bond (if ordered), & **Letters of Testamentary **	2-4 months (if not contested)
Notice to Creditors	2-4 months
Notice to Department of Health Services Inventory & Appraisalment	4-8 months



cont...The Probate Timeline

Pay State and Federal Taxes (if necessary)	6-12 months
Allow or Reject Creditor Claims	6-12 months
Possible Preliminary Distributions	6-12 months
Notice to Department of Health Services (if deceased received medical)	6-12 months



cont...The Probate Timeline

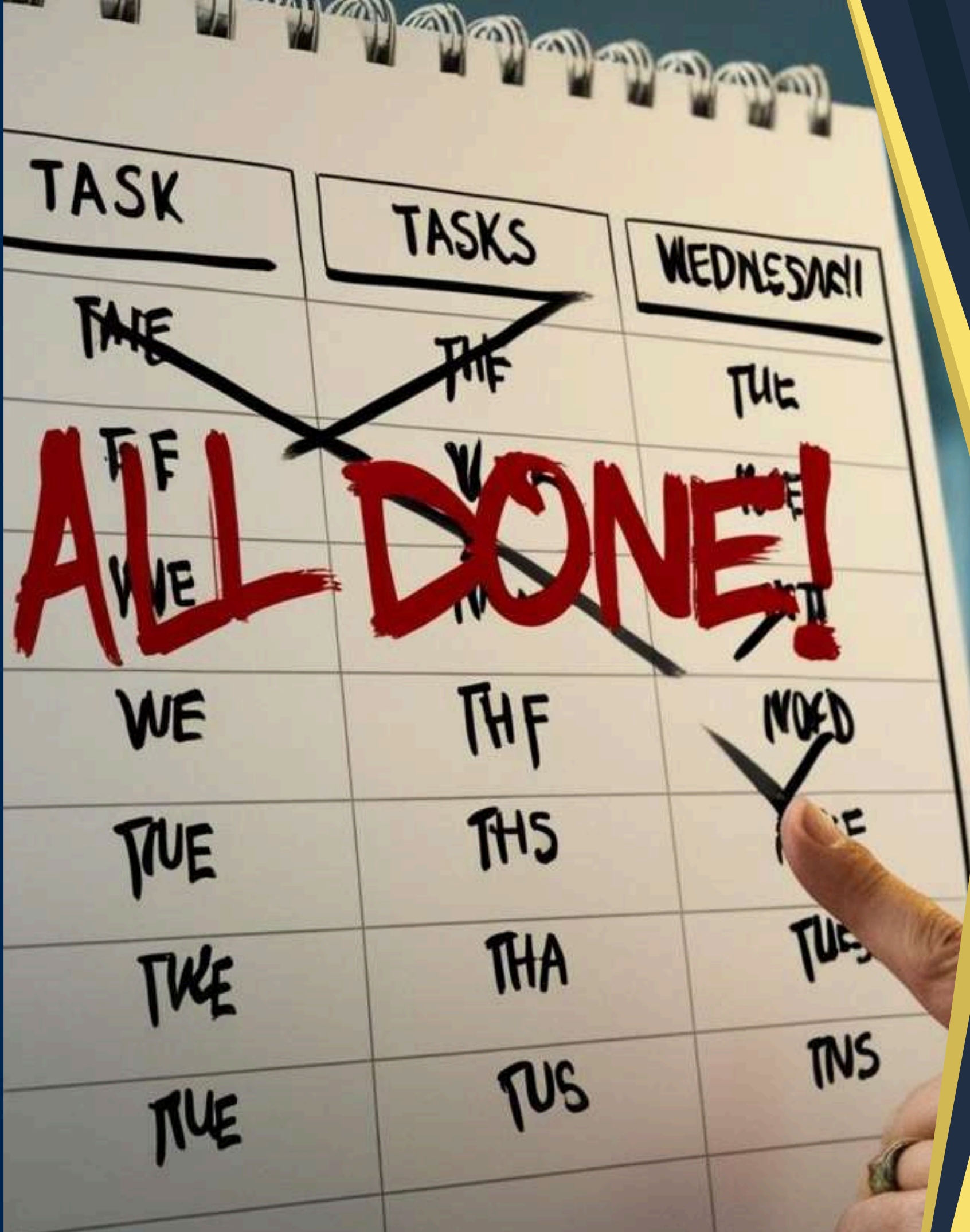
Notice to Franchise Tax Board (if heir is out of state)	6-12 months
Claim of Exemption (if assets transfer to a minor)	6-15 months
Receive Final Tax Letter from State and Federal (if appropriate)	6-18 months
File Petition for Final Distribution and Accounting	8-16 months
Hearing on Petition for final Distribution and Accounting	8-16 months



cont...The Probate Timeline

Distribution of Assets to Heirs	9-17 months
Final Discharge Order (indicates close of probate case)	9-18 months
Final Distribution of Funds	9-18 months

Congratulations



Choosing the Right Real Estate Firm

Factors to Consider

- a. Probate Experience & Knowledge
- b. Familiarity with Probate Laws in California
- c. Marketing & Sales Strategy
- d. Network of Probate Professionals
- e. Ability to Handle Property Condition & Repairs
- f. Negotiation & Multiple Offer Handling
- g. Understanding of Timelines & Paperwork
- h. Experience with Cash Buyers & Quick Closings
- i. Clear Communication & Compassion
- j. Fees & Commission Transparency

The Role of Helping Lawyers

Professional Responsibilities



For Attorneys

A Trusted Partner in Probate Real Estate Sales

How We Assist Attorneys:

- Seamless Property Valuation & Market Analysis
- Court-Compliant Appraisal Coordination
- Quick Property Sales to Minimize Delays
- Investor & Buyer Network for Sales in 30 Days or Less
- Ensuring our Clients Meet Creditor Obligations

By partnering with us, you ensure our clients' real estate needs are handled professionally and efficiently while you focus on legal matters.

Conclusion

With 26+ years of real estate experience, I specialize in probate sales, guiding executors, administrators, and attorneys through the complexities of selling inherited properties.

Well-versed in California probate laws, including the IAEA, I streamline court-confirmed sales, multiple offers, and investor negotiations. My strategic marketing attracts qualified buyers and cash investors, often closing sales within 30 days.

With a trusted network of probate professionals, I assist with estate clean-outs, repairs, and legal compliance. I provide clear communication, compassionate support, and transparent fees to ensure a smooth, stress-free process.

Call 650-773-3628 for a free consultation.



Moreno Work Group Real Estate Services

205 De Anza Blvd
Suite 231
San Mateo, CA. 94402

650-773-3628

The Moreno Realty Work Group services a large area including :

- San Francisco County
- San Mateo County
- Santa Clara County
- Contra Costa County
- Alameda County
- Contra Costa County

Please contact us at your convenience if are planning to sell your inherited probate property.

Robert Moreno



MORENO WORK GROUP REAL ESTATE SERVICES

Thank You

Moreno Work Group Real Estate Services

650-773-3628

Robert@MorenoWorkGroup.com

Call Email or Text Us

A Trusted Partner in Probate Sales

MORENO WORK GROUP
REAL ESTATE SERVICES

Avoiding the 7 Biggest Mistakes in Probate Real Estate

Fill out the Request Form on next page for your FREE E-Book

Every day, someone is entrusted with the responsibility of administering an estate.

*This e-book will be of tremendous help. While the process may seem daunting,
rest assured—we can help so it isn't overwhelming.*