

PROBATE PROPERTY

INITIAL WALK-THROUGH CHECKLIST

Santa Clara County, California | Printable Field Worksheet

Property Address: _____

Walk-Through Date: _____ Representative Role: _____

1 SECURITY & ACCESS

- ☐ Confirm authority to enter; identify any occupants or access restrictions
- ☐ Check exterior doors, windows, locks, gates, garage, and signs of entry
- ☐ Note security concerns; arrange authorized mail collection; defer USPS forwarding until court authority

2 UTILITIES & ESSENTIAL SYSTEMS

- ☐ Record status of electricity, water, gas, heating/cooling, and water heater
- ☐ Look for visible leaks, plumbing concerns, or disconnected services
- ☐ Flag unsafe systems; do not restore service without qualified guidance
- ☐ Discuss utility needs for sale preparation with a probate real estate broker

3 VISIBLE SAFETY & MAINTENANCE

- ☐ Note water stains, damage, odors, pests, exposed wiring, and trip hazards
- ☐ Identify unsafe or inaccessible areas; do not enter hazardous spaces
- ☐ List conditions needing a licensed professional or utility provider

4 CONDITION RECORD

- ☐ Take still photographs of safely accessible rooms and exterior areas
- ☐ Supplement still photos with video when helpful; do not replace photos
- ☐ Record observations factually and keep images with estate records

Immediate Concerns / Notes:

PROBATE PROPERTY

INITIAL WALK-THROUGH CHECKLIST

Santa Clara County, California | Printable Field Worksheet

5 CONTENTS & PERSONAL PROPERTY

- ☐ Note documents, valuables, furnishings, vehicles, storage areas, and clutter
- ☐ Check with probate counsel before removing, donating, or disposing of items
- ☐ Identify possible inventory, appraisal, or cleanout needs

6 EXTERIOR, LANDSCAPING & POOLS

- ☐ Check walkways, fences, drainage, debris, trees, and visible exterior damage
- ☐ If a pool/spa exists, note access barriers, gates, covers, and safety concerns
- ☐ Check HOA notices or exterior maintenance obligations, if applicable

7 ONGOING PROPERTY EXPENSES

- ☐ Confirm insurance status and any vacant-home coverage requirements
- ☐ Identify mortgage, taxes, HOA, utilities, landscaping, and security expenses
- ☐ Locate solar lease or power purchase agreement and payment obligations

8 OCCUPANCY & POSSESSION

- ☐ Record known occupancy arrangements without disturbing occupants
- ☐ Consult probate counsel before changing locks or taking possession steps

9 PRIORITIZE NEXT STEPS

- ☐ Separate urgent safety/security issues from professional evaluations
- ☐ List possible repairs, cleanup, and sale preparation decisions
- ☐ Discuss as-is versus repair options with the probate broker and counsel

Follow-Up Actions / Responsible Professional:

IMPORTANT

This is an initial observation worksheet, not an inspection or authorization to enter, remove property, perform repairs, or override occupant rights. Seek qualified advice.