The Inherited Home Checklist

Your step-by-step guide to what to do first when a property comes to you.

1. Gather & Secure · 2. Understand the Picture
3. Build Your Team · 4. Decide What to Do · 5. Make a Plan

Takesha Thompson, CPRES
Thompson Group DFW · 469-793-1375



The 3 Golden Rules

1. Don’t rush — you have time
2. Don’t sign anything yet
3. Don’t take it on alone

Phase 1: Gather & Secure (Week 1)

- ☐ Find the important papers
- ☐ Secure the property

Takesha Thompson, CPRES · 469-793-1375

Phase 2: Understand Your Picture (Weeks 1–2)

- ✓ Know what you actually own
- ✓ Check the property's condition
- ✓ Understand the tax picture

Phase 3: Decide Who's In Charge (Weeks 2–3)

- ✓ Figure out the legal path — probate
- ✓ Get the right help on your team

Takesha Thompson, CPRES · 469-793-1375

Phase 4: Decide What to Do (Weeks 3–8)

- ☑ Know your options — keep, sell, transfer, or hold
- ☑ Think through the practical realities
- ☑ Get a realistic value

Phase 5: Make a Plan & Move Forward (Week 8+)

- ☑ Put it in writing
- ☑ Take action
- ☑ Protect yourself

Takesha Thompson, CPRES · 469-793-1375

The One Thing to Remember

You don't have to have all the answers today. The goal of this checklist is to help you move from overwhelmed to in-control — one step at a time.

Want a one-on-one strategy session? I'm here to help. No pressure, no obligation — just clarity.

Takesha Thompson, CPRES
Certified Probate Real Estate Specialist &
Certified IFinder · 469-793-1375