The Executor's Property Checklist

A practical guide to managing estate property in British Columbia

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Being named an executor is a significant responsibility. When an estate includes real estate, this checklist can help you organize priorities and work with the professionals assisting you. Not every item applies to every estate, and not everything needs to happen immediately.

Property address: _____

Executor(s): _____

Estate lawyer: _____

01 Immediate property responsibilities

Protecting the property and its contents.

- ☐ Locate the will and obtain death certificates.
- ☐ Identify who has access; locate keys, remotes and security codes.
- ☐ Confirm whether the property is occupied or vacant.
- ☐ Notify the insurer and confirm vacancy coverage and inspection requirements.
- ☐ Maintain essential utilities, heating and security.
- ☐ Arrange care for any pets remaining at the property.
- ☐ Secure valuables and important documents.
- ☐ Photograph the property and its contents for your records.

02 Legal authority and probate

Confirming authority before making decisions.

- ☐ Consult the estate lawyer about your authority to act and probate requirements.
- ☐ Confirm legal ownership, obtain a title search and identify registered charges.
- ☐ Confirm co-executor responsibilities and any tenancy or occupancy rights.
- ☐ Discuss restrictions on selling or transferring the property.
- ☐ Establish a communication plan for beneficiaries.
- ☐ Confirm when the property may be listed and when a sale may complete.

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03 Insurance and property expenses

Managing the ongoing cost of ownership.

- [ ] Review insurance coverage, renewal dates and required inspections.
- [ ] Confirm mortgage payments and outstanding balances.
- [ ] Review municipal property taxes.
- [ ] Maintain necessary electricity, gas and water services.
- [ ] Arrange mail collection or authorized forwarding.
- [ ] Notify strata management, where applicable.
- [ ] Review strata fees and outstanding special levies.
- [ ] Arrange landscaping and seasonal maintenance.
- [ ] Review applicable vacancy tax declarations and exemptions with an advisor.
- [ ] Maintain a record of property-related expenses and receipts.

Estimated monthly property expenses: $_____

04 Personal belongings and contents

Managing the contents of a home thoughtfully.

- [ ] Review the will for instructions regarding personal possessions.
- [ ] Create an inventory of valuable or significant items.
- [ ] Identify items requiring professional appraisal.
- [ ] Secure photographs, family records and sentimental belongings.
- [ ] Confirm authority and coordinate with beneficiaries before distributing possessions.
- [ ] Consider professional organizing or estate clearance services.
- [ ] Arrange appropriate donations, recycling or disposal.
- [ ] Retain records of items sold, donated or distributed.

There is no need to empty a home immediately. A thoughtful approach can help prevent unnecessary expense, family disagreements and the loss of important belongings.

Notes and priorities

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05 Property valuation and preparation

Establishing value and determining what is worth doing.

- ☐ Discuss date-of-death valuation requirements with the estate lawyer or accountant.
- ☐ Arrange an independent appraisal where appropriate.
- ☐ Obtain a current comparative market analysis from a Realtor.
- ☐ Gather available property records, permits and renovation documents.
- ☐ Identify known defects and maintenance concerns.
- ☐ Consider environmental concerns, including underground oil tanks where applicable.
- ☐ Obtain relevant strata documents for condominiums and townhomes.
- ☐ Evaluate necessary repairs, cleaning and preparation.
- ☐ Compare improvement costs against their potential benefit.
- ☐ Establish a realistic preparation budget and timeline.

Not every estate property needs renovation before being sold. Careful cleaning, organization and appropriate pricing may be the most sensible approach.

06 Listing and selling the property

Developing a strategy that serves the estate.

- ☐ Confirm legal authority and appropriate listing timing with the estate lawyer.
- ☐ Select a Realtor experienced in estate property sales.
- ☐ Review current market conditions and comparable sales.
- ☐ Establish an appropriate asking price.
- ☐ Review estimated selling costs and potential net proceeds.
- ☐ Discuss property disclosures and contractual requirements.
- ☐ Approve the marketing and showing strategy.
- ☐ Establish a process for reviewing offers.
- ☐ Maintain written records of significant decisions.
- ☐ Coordinate contract conditions and completion dates with the estate lawyer.

Target listing date: _____ Estimated sale price: $_____

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07 Completion and final responsibilities

Bringing the property sale to an orderly conclusion.

- ☐ Confirm completion, adjustment and possession dates.
- ☐ Coordinate conveyancing documents with the estate lawyer.
- ☐ Arrange removal of remaining belongings.
- ☐ Complete agreed-upon repairs or contractual obligations.
- ☐ Arrange final cleaning, where appropriate.
- ☐ Maintain insurance until advised it can safely be cancelled.
- ☐ Arrange final utility readings and account closures.
- ☐ Gather all keys, remotes and access devices.
- ☐ Retain the statement of adjustments and sale documents.
- ☐ Confirm that sale proceeds are handled as directed by the estate lawyer.
- ☐ Consult the estate lawyer and accountant before distributing proceeds.

Final notes and outstanding tasks

You don’t have to navigate this alone.

Every estate is different. Understanding the property’s value, determining what needs to be done and establishing an appropriate timeline can make the process more manageable. I provide thoughtful, practical real estate guidance to executors and families throughout Vancouver, working alongside their legal and financial professionals. An initial conversation does not require a commitment to sell.

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Important information: This general British Columbia real estate planning resource is not exhaustive and does not constitute legal, tax, accounting or insurance advice. Consult qualified professionals about the circumstances of your estate.