Inherited-Home Readiness & Selling-Strategy Matrix

A printable planning worksheet for Arizona families selling an inherited home. Fill it in on paper, then bring it to your legal, tax, title, and real estate conversations.

> Use this worksheet before meeting with legal, tax, or real estate professionals. It is a planning tool only — not legal, tax, appraisal, inspection, financial, or investment advice. It does not determine which sale method will produce the highest proceeds.

A Legal & Title Readiness

- ☐ Do we know how title is currently held?
- ☐ Is there a will, trust, beneficiary deed, or court proceeding?
- ☐ Has authority to sell been confirmed?
- ☐ Are multiple owners or beneficiaries involved?
- ☐ Is legal guidance still needed?

> Gathering documents does not establish ownership or authority. Qualified legal and title professionals should confirm those issues before the property is listed or contracted for sale.

B Property Readiness

- ☐ Occupied or vacant?
- ☐ Secure and insured?
- ☐ Personal property addressed?
- ☐ Major repairs known?
- ☐ Deferred maintenance items identified?
- ☐ Utilities and landscaping maintained?

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Financial Readiness & Family Priorities

Money questions first, then the priorities that decide which selling path fits your family. Score each priority from 1 (low) to 5 (high).

C Financial Readiness

Ask your CPA or tax professional

- ☐ Mortgage balance/payoff known?
- ☐ Other liens identified?
- ☐ HOA/property-tax status known?
- ☐ Carrying costs estimated?
- ☐ Date-of-death valuation information gathered?
- ☐ CPA/tax review completed or scheduled?

D Family Priorities — Score 1 (Low) to 5 (High)

Maximize potential proceeds
What the market could pay, before costs.

1 2 3 4 5 Score one circle

Sell quickly
How much speed matters to the family.

1 2 3 4 5 Score one circle

Avoid repairs or renovation
Sell in current condition instead of fixing first.

1 2 3 4 5 Score one circle

Minimize carrying costs
Taxes, insurance, utilities, HOA while you hold.

1 2 3 4 5 Score one circle

Reduce family workload
Cleanout, coordination, and decisions.

1 2 3 4 5 Score one circle

Increase certainty of closing
Fewer contingencies and less risk of falling through.

1 2 3 4 5 Score one circle

Allow additional occupancy time
Time before the home must be empty.

1 2 3 4 5 Score one circle

Maximize open-market exposure
How widely the home is marketed to buyers.

1 2 3 4 5 Score one circle

Notes on cost, timing, and carrying costs

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What the Family Decided & What to Ask Next

Rank the three priorities that matter most, list the questions you still need answered, and keep the disclosures with this worksheet.

E Our Top Three Priorities

01 _____

02 _____

03 _____

Scoring together reveals where the family agrees — and where tradeoffs need discussion.

F Questions for Our Professionals

Legal · Tax · Title · Real estate

_____

_____

_____

_____

_____

G Next Step

When the worksheet is filled in, a Seller Strategy Consultation reviews the property's current market position, the preparation paths, timing, and estimated proceeds — and flags the questions that belong with an attorney, CPA, or title professional. No obligation. ClearlySold.com/schedule

Scheduled with (name / date): _____

Keep this page with your notes. The educational disclosures that govern this worksheet and the guide are on page 4 — read them before acting on anything written here.

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KEEP WITH THE WORKSHEET

Educational Disclosures

These disclosures apply to the Inherited-Home Readiness & Selling-Strategy Matrix, the worksheet you filled in, and the guide it comes from — Selling an Inherited Home in Arizona: A Family's Planning Guide.

Planning tool only

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Educational disclaimer

This guide and worksheet are for general educational purposes only. They are not legal, financial, tax, lending, investment, construction, inspection, insurance, probate, foreclosure, bankruptcy, accounting, or appraisal advice. Consult qualified professionals — including licensed attorneys, CPAs, inspectors, lenders, and financial advisors — regarding your individual circumstances. Review all agreements with appropriate professionals before signing.

Documents and authority

Gathering documents does not establish ownership or authority. Qualified legal and title professionals should confirm those issues before the property is listed or contracted for sale. This material is educational only and does not determine whether probate is necessary or who legally owns or may sell a specific property.

No guarantees

Nothing in this guide or worksheet guarantees a sale price, savings, eligibility, approval, offer, bidding activity, market response, timeline, or closing. All scenarios, characters, properties, and numerical examples are entirely fictional and simplified unless clearly stated otherwise. They are not actual clients, testimonials, case studies, endorsements, predictions, or promises. Market conditions, pricing, program availability, and applicable laws may change; verify current information with appropriate professionals before acting.

Compensation

Real estate compensation is negotiable and established through applicable written agreements. Sellers are not automatically required to offer compensation to a buyer's brokerage. Buyer-broker compensation decisions should be reviewed in all applicable written agreements before listing. Any example numbers are fictional educational illustration only.

No repair guarantee

No repair or renovation is guaranteed to increase sale price or produce a positive financial return. Selling as-is does not automatically eliminate applicable disclosure responsibilities.

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