
Family Case Study

Background

When the family’s matriarch passed away, her San Diego property became the focal point of an out-of-state probate challenge. The appointed Administrator, lived in Arizona and faced tight court deadlines, title ambiguities, and the logistics of preparing the home for sale from 500 miles away.

Challenges

- 1. **Title Issues:** Existing liens and unclear heir claims delayed court approval.
 - 2. **Remote Coordination:** Susan needed reliable on-site supervision for inspections and repairs.
 - 3. **Market Timing:** The local market was shifting, requiring quick yet effective staging and marketing.
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Our Approach

Challenge	Strategy Implemented	Outcome
Title Clearance	Partnered with a probate-experienced attorney who resolved liens and clarified heir rights through additional documentation.	Court approved title in 4 weeks (vs. typical 6–8 weeks).
Remote Oversight	Engaged a local property manager for bi-weekly walkthroughs, shared via video call, and coordinated contractors for prioritized repairs.	Maintained property condition and expedited appraisal scheduling.
Staging & Marketing	Hired a staging team to present the home’s best features; utilized professional photography and 3D virtual tours.	Received 3 competitive offers within 2 weeks of listing; closed at 98% of asking price.

Timeline of Key Milestones

- Week 1–2:** Petition filed; local counsel engaged.
- Week 3–4:** Title issues resolved; property manager onboarded.
- Week 5–6:** Repairs completed; staging and photography.
- Week 7–8:** Listing launched; offers received.
- Week 9:** Accepted offer; escrow opened.

Week 10: Successful closing; funds disbursed to heirs.

Lessons Learned

Proactive Title Review: Early attorney involvement prevents downstream delays.

Local Partnerships: A trusted property manager is critical for remote administration.

High-Quality Presentation: Professional staging and virtual tours significantly expand buyer interest.

Client Testimonial

“Working with Rudy Rodriguez of HomeSmart Key Realty in Victorville, CA , transformed a potentially stressful process into a smooth, efficient experience. Despite being out of state, I felt fully supported every step of the way.”
— Susan Smith, Administrator

Disclaimer:

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