
Strategy Call Prep Worksheet

Courtesy of Rudy Rodriguez

Introduction

To make the most of our strategy call, please complete the following worksheet. It will help us discuss your goals, challenges, and next steps for managing your probate case, especially if you're considering selling inherited property.

1. Estate Overview

Decedent's Name: _____

Location of Estate Property: _____

Probate Status: (Circle all that apply)

- Open
- Closed
- Pending
- Not Started

Executor/Administrator Name: _____

Attorney's Name (if applicable): _____

Current Property Condition: (Circle all that apply)

- Vacant
- Occupied
- In need of repairs
- Well maintained

2. Goals for Probate Case: (Circle all that apply)

What are your primary goals?

- Settle the estate quickly
 - Maximize sale price of inherited property
 - Minimize taxes or fees
 - Resolve title issues or probate challenges
 - Clear up family disputes
 - Other: _____
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3. Property Details

Type of Property: (Circle all that apply)

- Single-family home
- Condo
- Multi-family home
- Commercial property
- Vacant land

Property Condition: (Circle all that apply)

- In need of repairs
- Move-in ready
- Needs cleaning/staging
- Other: _____

Previous Repairs/Updates (if any):

4. Challenges You're Facing

What are your biggest challenges?

(Circle all that apply)

- Title/ownership issues
 - Probate process is taking longer than expected
 - Uncertainty about property sale process
 - Family disagreements or lack of communication
 - Property maintenance or repairs
 - Market conditions or timing of sale
 - Other: _____
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5. Budget and Timeline

What is your estimated budget for property repairs/maintenance?

(Circle all that apply)

- \$0 – \$5,000
- \$5,000 – \$10,000
- \$10,000 – \$20,000
- \$20,000+

When would you like to sell the property?

- Within 3 months
- 3–6 months
- 6+ months

Are there any specific deadlines we need to consider?

6. Additional Notes

Do you have any questions or concerns that you'd like to address during our call?

7. Next Steps

Please select the preferred method for scheduling the call:

- Phone
- Video (Zoom, Google Meet, etc.)

Preferred date and time for the call:

Disclaimer:

This document is for informational purposes only and does not constitute legal, financial, or professional advice. Always consult qualified professionals (e.g., an attorney, accountant, or real estate agent) for guidance specific to your situation.