A GUIDE FOR THE FAMILY · 2026

Your Parents' House: Start Here

What to do with your parents' house in San Diego, and in what order.

For the son or daughter who just became the one handling it. Whether the house sells next month, next year, or it already has to be sold.



JESSE MORRISON
TRUST SALES · SENIOR TRANSITIONS

What's inside

Before you start 3

Your first week 4

The three things you're worried about 6

Find your situation 8

Get the paperwork straight 9

The conversations 15

Decide the plan for the house 18

Get the house ready 23

Sell it 25

After closing 29

What you can hand off 30

The checklist 31

Your next step 32

Before you start

Hi friend,

I'm Jesse Morrison, a REALTOR® with HomeSmart Realty West. I've sold homes in San Diego since 2005. That's twenty years of knowing what these houses are worth, what goes wrong in escrow, and how to fix it. Now I've chosen to focus that on one kind of family: sons and daughters handling a parent's home, when a parent's health changes, when care is needed, and when the house has to be sold.

This guide is the whole picture. It covers every step between "something happened with Mom or Dad" and "it's done, and we did it right," in order, with why each step matters.

It won't cover every detail. Each family's house, paperwork, and people are different, and that's where hands-on help comes in. But when you finish, you'll know what has to happen, what comes first, and what it costs to get it wrong.

If you're a parent reading this about your own house, welcome. It all still applies, and it may be the easiest way to start the conversation with your kids. Hand them this guide.

If something just happened, turn the page. That's your first week.





Your first week

Whatever happened, a fall, a diagnosis, a hospital stay, or a loss, these are the first things to take care of. Most of them take a phone call or a drawer search. **None of them commit you to selling anything.**

1. Take care of your parent first.

The house can wait a few days. Your parent can't. Get them safe and cared for before anything else.

2. Find the papers.

Look for the will, any trust, any power of attorney, a healthcare directive, the deed, the homeowner's insurance, and any mortgage, reverse mortgage, or loan on the house. Almost every decision after this depends on what these papers say, so finding them now saves weeks later.

3. Find out whose name is on the deed.

Not whose name is on the will. Whose name is on the recorded deed at the county today. That one answer decides whether the house can be handled quietly or has to go through court. **It's the most important question in this guide,** and there's more on it soon.

4. Find out who can sign for your parent right now.

If your parent can't make or sign decisions today, somebody else has to have the legal right to. Without that, nothing can move. Not the house, and not the bank accounts.

5. Protect the house.

Call the insurance company if the house will sit empty. Lock it up. Put valuables and important papers somewhere safe. Stop or forward the mail. Many home insurance policies limit coverage once a house sits empty for 30 to 60 days, and a full mailbox tells the whole street nobody's home.

Source: Insure.com, "Vacant home insurance," updated May 6, 2024. Your policy's own wording decides.

6. Don't sign anything with anyone yet.

That includes cash-offer letters, cold callers, and anyone who "just happens" to know about your family's situation. Families in your spot are easy targets, and nothing you're offered this week beats what you'll find once you know where you stand.

7. Get the family on one call.

Everyone who has a say, even the sibling who's hard to reach. Agree on who's the point person. Families rarely fall apart over the house. They fall apart when one person decides and the others hear about it later.

The three things you're worried about

If you're like most people reading this, **three fears are sitting in your chest right now,** even if you haven't said them out loud.

Being taken advantage of.

You've never done this before, you're stretched thin, and you've already heard stories about people who pounce on families like yours.

Failing your parent.

Maybe it's making Mom feel like she's being counted down. Maybe it's something harder. Your parents had a picture of how this would go: how the house would be handled, where the money would go, what they'd leave behind. Now you're making calls they never saw coming, and some of them may not match what they had in mind. Like money they meant to leave the family going to their care instead.

Breaking the family.

One wrong move with a sibling and every holiday after this is different.

Two of them can make the first conversation feel impossible. Breaking the family often shows up as this thought:

If I bring this up, I'm the kid who's circling the inheritance.

And failing your parent often shows up as the one that stops people even harder:

How do I talk to my mom about her house without telling her I think she's going to die?

Those two thoughts are why so many families put this off, and waiting is when the expensive mistakes happen. So let's take them off the table.

The inheritance thought is about how you'll look to your family. Here's the difference. Asking what your parents want is protection. Deciding what happens to their house without them is a claim. One of those is love. The other is the thing you're afraid of being. They're not the same, and your parents can tell them apart faster than you think.

The second thought is about how your parent will feel, and it's the harder one. Nobody wants to sit across from their mother and say something that lands as "I've been thinking about after you're gone." You're right to be careful about that.

So don't have that conversation. Have a different one. You're not asking your parents when they're going to die. You're asking them what they want, and whether the paperwork agrees. The conversation section of this guide gives you the words.

And the first fear, being taken advantage of while you figure this out, gets answered all the way through this guide. By the time you finish, you'll know what things should cost, who's supposed to do what, and what to watch out for.

One of my clients put it better than I can:

> "His consistent calm demeanor and patience made the decision to sell my home a very easy one."
>
> **MIA M.**

That's the job. Nobody should be pushing you toward anything.

Find your situation

A house your parents own gets sold once. But families reach that point from three very different places. Find yours. The steps in this guide apply to everyone, and some matter more depending on where you are.

A parent's health just changed.

Something happened: a fall, a diagnosis, a visit that made it clear things aren't okay. Nobody wants to be the one to say it, but this is the best time to plan.

Most important for you: the paperwork section, and protecting the house first. This is the moment to get it protected, and it can usually be done quickly.

Care is needed now.

Assisted living, memory care, or in-home care has to be arranged. Often the house has to help pay for it. This usually moves in weeks, not months.

Most important for you: who can sign, and how the care gets paid. That decides what happens to the house.

A parent has passed.

Now somebody is the successor trustee or the executor, and the house has to be dealt with while everyone is grieving. This is also when investors and cold callers show up fastest.

Most important for you: the paperwork section, and "If a parent has passed" in the plan section. Pay extra attention if your other parent is still living in the house.

Want someone to look at your family's situation with you? That's what the free Family Home Review is for.

Book your free Family Home Review →



Get the paperwork straight

The one question that decides everything

Whose name is on the deed right now?

Not whose name is on the will. Not what the binder in the hall closet says. Whose name is on the recorded deed at the county today.

It's the first thing I check, because it's one of the most common problems in California estate plans:

> A lot of families have a trust, and the house was **never put into it.**

The parents did everything right. They hired an attorney. They paid for the trust. They got the binder. Then the last step, moving the house into the trust by recording a new deed, never happened. Or it happened and got undone by a refinance. The binder sits on the shelf, the house is still in Mom's name, and nobody finds out until the worst possible moment.

Sometimes an attorney can fix a house that fell out of the trust with a shorter court petition instead of full probate. Sometimes not. Either way, it's a court step, and it's far easier to fix while your parent can still sign.

And a will does not keep a house out of court. A will is a set of instructions *for* the probate court. What keeps a house out of court is how it's titled, usually a living trust with the house actually deeded into it.

What it costs when the house is not in the trust

California sets probate fees by law. The attorney and the executor each get a fee off the same schedule, and **the fee is figured on the full value of the home, not the equity.** A $1,000,000 house with a $400,000 mortgage still pays fees on the full million.

ON A $1,000,000 ESTATE	
Attorney's fee set by law	$23,000
Executor's fee set by law	$23,000
Combined	$46,000
Court filing, probate referee, publication	about $2,500
Bond, only if the court requires one	$5,000 to $10,000 a year
Total, estimated	**$48,500 to $58,500**

Source: California Probate Code sections 10800 and 10810 fee schedules. Court costs and bond estimates: Opelon LLP, a San Diego probate firm, "Understanding California Probate Costs in 2026" ($435 per court petition, a referee fee of 0.1% of the value, $200 to $500 for publication, and bond premiums of about 0.5% to 1% of the estate a year). Court costs and bond rates vary by county and by case. A bond is often waived.

And the time. California's own courts say probate typically takes 9 to 18 months, and sometimes longer. The house can't even be listed until the court gives someone legal authority, which usually takes a few months on its own. After that, it sells on the court's schedule, not yours.

Source: California Courts Self-Help Guide, "Overview of formal probate," selfhelp.courts.ca.gov/probate/formal-probate, checked October 9, 2026.

"But our house is small. Doesn't it skip probate?" Probably not. As of April 1, 2025, California's shortcut for a primary home applies up to $750,000 (California Assembly Bill 2016). Across most of San Diego County, a single-family home is well over that and has been for years.

Four ways to find out whose name is on it

1.

Ask your parents. Just: "Is the house in the trust?" A surprising number of people don't know, and the question itself often starts the whole conversation.

2.

Ask the attorney who drew up the trust, if there is one.

3.

Check the county. Every deed in California is a public record, and you can request a copy of the current one.

4.

Ask me. I pull property profiles all the time. It's part of the free Family Home Review at the end of this guide.

Who can sign for Mom or Dad

This is the question most families don't know to ask until they're stuck. **If your parent can't make or sign decisions right now, who can?** The answer comes from the papers you found in your first week. There are three common paths:

A trust, with a successor trustee.

If the house is in a trust, the trust usually names who takes over. If your parent is living but can't manage things, most trusts let the successor trustee step in. This usually requires one or two doctors to confirm it in writing. After a death, the successor trustee's authority starts right away, without a court.

A power of attorney.

A financial power of attorney can let someone act for your parent while your parent is alive, including selling a house outside the trust, if the document gives that power. It generally has to be notarized and recorded to be used for real estate. **It stops working the day your parent dies.**

Neither.

If there's no trust and no power of attorney, and your parent can't decide, the family usually has to go to court for a conservatorship. A judge then oversees major decisions, including selling the house. It's slower, costs more, and is public.

After a death, with no trust. Being named in the will isn't enough to sign anything. Only the person the court appoints can, and only once the court issues their paperwork.

Getting this right early is what lets a sale close at all. The right person has to sign. And if a parent passes during a sale, what happens next depends entirely on these papers.

This is general information, not legal advice. Which path fits your family is a question for an estate attorney. I'll tell you when it's time to ask, and I'm always meeting and vetting attorneys who do this work locally, so I can introduce you to one.

Protect it first, even if you're selling

Say a parent's health changes suddenly, and the house has to be sold to pay for care. Someone suggests putting it into a trust first, and it's a fair question: why pay an attorney and add time to protect a house you're about to sell anyway?

Here's the problem with that math. A purchase contract survives a death. What changes is **who has the legal right to sign the closing papers,** and the deed decides that, not the contract.

- **If the house is in a funded trust,** the successor trustee steps in. It's paperwork, and the sale usually goes through.
- **If it's held jointly with a surviving spouse,** the survivor can usually finish the sale much the same way.
- **If it's in your parent's name alone,** nobody can sign until the probate court appoints someone. That means opening probate in the middle of an escrow, with a buyer whose loan and patience are both on a clock.

So the rule, said plainly: when a parent's health is uncertain, get the house protected first, even if you're selling it right away. Especially then.

Funding a trust usually costs a few thousand dollars and can often be done quickly. An estate attorney confirms what applies to your parents' deed.

Who does what

You'll hear from a lot of people. Here's who answers which question.

WHO	WHAT THEY'RE FOR
Estate attorney	Trusts, wills, the deed, who can sign, and probate. The legal work.
Elder law attorney	Paying for long-term care, including Medi-Cal questions.
CPA	Taxes, including when it's smartest to sell.
Placement advisor or senior move manager	Finding the right care setting, and moving your parent into it.
Real estate agent who knows trust sales	What the house is worth and nets, getting it ready, selling it, and keeping everyone updated.

The most expensive mistakes happen when one person answers another person's question. I'm not an attorney, and I don't give legal or tax advice. My job is the real estate, and knowing which question goes to whom.

Want someone to look at your family's situation with you? That's what the free Family Home Review is for.

Book your free Family Home Review →



The conversations

With your parent

The one move that gets past both of those thoughts: make it about their wishes. Not about the money. Not about the ending.

It takes the money off the table, so nothing you say sounds like counting the inheritance. You're not asking what you get. You're asking what they want.

It takes the ending off the table, because you're not talking about them dying. You're talking about them deciding.

Ask what they pictured, not just what they want now. Most parents have a plan in their head: who gets what, what the house was for, what they hoped to leave behind. Their kids often don't know it. Hearing it now is how you honor it later, even if some things can't go the way they pictured.

If something has already happened, any talk about the house can feel like planning for the worst. It doesn't have to. The same move works, and it matters even more now. You're not asking because Dad is sick. You're asking because you want what he wants to be what happens. Keep it small. Keep it about him. And if he's able to decide, let him decide.

Three openers that don't blow up:

If you're worried about how you'll look:

"Dad, I don't need to see anything private. I just want to know a plan exists and where to find it if I ever need it."

If you're worried about how they'll feel:

"Mom, I was reading about how long probate can take in California when a house isn't in a trust. Can we make sure that never happens to us?"

If you only use one, use this one:

"I want to make sure whatever YOU want is what actually happens. Right now, the law decides, not you."

If they shut it down. They probably will the first time. That's normal, and pushing rarely works. Come back in a few days with something smaller: "I don't need any details. I just want to know if an attorney helped you with any of this, and who, in case I ever need to call them." If they change the subject, respect it. It's their house and their timing. Most parents come back to it once the idea isn't new.

With your siblings

One call, one point person. Everyone who has a say joins the same call, even briefly, even if it's awkward. Then agree on one person who keeps things moving.

Put the plan in writing, where everyone can see it. Not a group text that scrolls away. One shared page that says what's decided, what's next, and who's doing it. The sibling who was left out doesn't hear "I was handling it." They hear something worse. A plan everyone can see stops that before it starts.

Keepsakes first. Before anything is sorted, sold, or donated, let each family member name what matters to them. It's fair, and it heads off the fights that start over a single item years later.

If you can't agree, bring in a neutral person, like a mediator or the family's attorney, before it breaks something that matters more than the house.

> "Through this whole process he was dealing with and communicating with the whole family, not just my mother ... He made sure we were all in the know."
>
> **ASHLEY A.**



Decide the plan for the house

Know what it's worth, and what it would net

Not a website estimate. What it would actually sell for, and what would be left after costs. That number tells you whether a care move is affordable, and every choice below starts from it.

If care is needed: how is it being paid for?

This one question decides almost everything else about the house.

- **If the house has to pay for care,** it usually needs to sell, and often on a timeline set by the care, not the market.
- **If other money covers care,** the family can choose between selling, renting, or keeping the house for now.

When care costs run into what your parents planned. This is one of the hardest parts, and it's where many families feel like they're failing their parent. The money Mom meant to leave the family may have to go to her care instead. There's no guilt in that. It's what the money was there for. But there may be options you don't know about. **That's a question for an elder law attorney, and it's worth asking before the house is sold, not after.**

And this usually moves fast.

A Place for Mom found that

77%

of family caregivers who haven't started looking assume they have a few months to more than a year.

In reality,

69%

end up arranging care within 60 days.

Source: A Place for Mom, 2025 Senior Care Search Trends Report, published January 21, 2026.

Sell, rent, or keep: add up the whole number

Property taxes are the number everyone thinks about. They're not the expensive part.

A house costs money every month whether anyone lives in it or not: insurance (often more for an empty house), utilities, landscaping, and upkeep. Then there are the big ones: a roof, an HVAC system, a water heater, plumbing, an electrical panel. In a house your parents bought decades ago, several are near the end of their life at the same time. And if the plan is to rent it out, add a property manager, the months between tenants, and the wear a tenant puts on a house.

None of this means keeping the house is wrong. Some families keep it and are glad they did. It means adding up the whole number before you decide.

Ask the CPA about timing before you sell

When the house sells can change the tax bill a lot.

Selling while your parent is living: many people can leave out up to $250,000 of gain ($500,000 for a married couple) when they sell their main home. There are special rules when someone moves into a care facility.

Selling after a death: heirs usually get what's called a "step-up," where the home's tax value resets to what it was worth on the date of death. That can erase most of the gain. How your parents hold title between them can change how much of the home gets that reset, so it's worth the CPA's look too.

Source: IRS Publication 523, Selling Your Home.

For some families, the right timing saves tens of thousands of dollars. For others, the care costs decide. **Which is true for your family depends on the numbers. That's a CPA's call, not mine,** and it's worth asking before you choose a date.

Prop 19: the same law, pointed two ways

↘

The trap: "If we inherit it, we'll just keep it."

Under Prop 19, for transfers on or after February 16, 2021, a child can only keep a parent's low property tax base if the child moves into the home as their own main home within a year, and even then only up to a cap. If no child moves in, the home is **reassessed to full market value, permanently.** A house bought in the 1970s with a tiny tax bill can become one of the most expensive things to keep.

↗

The good part: moving to something smaller.

Homeowners 55 or older can sell and carry their existing tax base to a replacement home anywhere in California, up to three times, if they buy within two years of selling. For a parent downsizing, that can decide whether a move is affordable.

Source: California State Board of Equalization, Proposition 19 page (boe.ca.gov/prop19), accessed August 2026. Forms and deadlines apply. Your parents' CPA or attorney should confirm the details.

If a parent has passed

The successor trustee or executor steps in. If there's a funded trust, the successor trustee can usually act right away, without a court. If there's no trust, the court appoints an executor or administrator first.

Keep family members informed. In California, after a trust becomes final because of a death, the trustee has to send a formal notice to beneficiaries and heirs, generally within 60 days (California Probate Code section 16061.7). Beyond the law, keeping everyone in the loop is what keeps the family speaking to each other.

If your other parent is still living in the house, the house may not need to do anything yet. Depending on how title was held, through a trust, jointly, or in one name, the surviving parent may keep it with some paperwork, or it may need a court step, often a shorter one than full probate. An estate attorney confirms which applies.

Tell the attorney early about two things: a reverse mortgage, which usually comes due when the owner dies, and whether your parent ever received Medi-Cal.

The weeks after a loss are when families most often get rushed, by grief, by the mail, and by people who move fast. Knowing the order is what keeps you in control.

All of this is general information, not legal advice. An estate attorney confirms what applies to your family.



Get the house ready

The belongings are the hard part, not the house

If I could put one sentence on the wall for every family in this situation, it's that one. The word people use, over and over, is *overwhelmed.* And almost every time, they're talking about the stuff.

It's not really about the stuff either. Letting go of an item can feel like letting go of a whole chapter of life. That's why "just donate it" is such useless advice.

> "After living in my home for over five decades, where I raised my children and collected a lifetime of memories, deciding to sell was incredibly hard. The thought of sorting through 54 years worth of belongings and handling all the paperwork was overwhelming."
>
> **SALLY M.**

If your parent is moving: measure the new place first. Get the floor plan and figure out exactly what fits. Once that's settled, the grip on everything else loosens. It stops being "what do I give up" and becomes "what goes where."

Keepsakes first, then everything else. After family has chosen, decide what happens to the rest: donation, family, an estate sale, haul-away, or a mix. Almost everyone defaults to an estate sale because it's the cultural script, not because anyone checked whether it's right for this house. An estate sale sells the contents. It isn't the same as selling the house. Often a mix is faster, cheaper, and far less painful.

You don't have to fix everything

A lot of families worry the house is too dated, too full, or too embarrassing to let anyone see. It isn't. Nobody's judging the house. Buyers in San Diego are looking at what it can become.

Fix only what pays. Some repairs return more than they cost. Most don't. You should know which is which before you spend a dollar.

> "I told Jesse I wanted to sell the house 'as-is.' The first weekend my house was on the market, I received 6 viable offers and made a choice the following week."
>
> **BARBARA A.**

Two paths: price both

Prepare it and sell it on the open market.

Usually more money, with more time and work.

Take a clean cash sale as is.

Faster and simpler, usually for less.

Both are real. A good agent prices out both and lets the family choose, instead of steering you toward the one that suits the agent.

Sell it

The whole process, start to finish

A client once told me the hardest part wasn't any single step. It was not knowing what was coming next.

> "I had never sold a house under circumstances like that, and I was afraid the whole process would just happen to me instead of with me."
>
> **BECKY HENZEL**

So here's the whole map, up front.

Stage 1. Before anything is listed.

A week or a year, at your family's pace.

1. Pull title and confirm whose name is on the deed.
2. Confirm the trust and who the successor trustee is. If the house isn't in the trust, stop. That's a legal question first, and you need an attorney before you need me.
3. Find out what it's worth, and what it would net.
4. Choose the path: prepared sale or cash sale.

Stage 2. Getting it ready.

Typically two to six weeks.

5. The belongings.
6. Prep, only where it pays.
7. Photos, video, sign, listing.

Stage 3. On the market.

Price decides how long.

8. The first two weeks bring the most attention the listing will ever get.
9. Offers and negotiation. A home priced right gets its offers early. A home priced high sits, and then usually sells for less than it would have.

Stage 4. Escrow.

Typically about 30 days, give or take.

10. Inspections, appraisal, repair requests.
11. Disclosures. **In a trust sale, these work differently than a normal sale,** and getting them right protects the trustee from a complaint later.
12. Close.

Stage 5. After.

13. Loose ends. If you live far away, this whole list can run without you on a plane.
14. The part nobody warns you about. Covered below.

"We were living in another state and Jesse handled all the logistics related to inspections, cleaning, etc. which saved us a lot of time and remote coordination."

TIM B.

One honest note: any stage can stall, and stalls usually come from outside the family, like a buyer's loan, a title issue, or a sibling who needs more time. A good agent tells you that up front instead of promising a date they can't control.

Timing is real. Pressure is not.

Seasons are real here. In San Diego house sales going back years, prices climb from January to June, then level out or dip from July to January.

Highest month: June

3.7%

above the year's average price

Lowest month: January

3.9%

below the year's average price

For example, if the year's average price is $1,000,000, **that's a gap of about $76,000** between a typical January sale and a typical June sale.

These are closing dates. A sale that closes in June was usually agreed to in May, so spring is when buyers pay the most. The season is a tilt, not a promise. In any one year, the high can come earlier or later.

Source: Redfin Data Center, San Diego metro single-family homes, 2012 to 2025, each month's median sale price compared with that year's average (2020 to 2022 left out). The California Association of REALTORS®' San Diego County detached homes, 1990 to 2025, show the same shape (June +3.0%, January -2.6%). A median is all the houses that sold that month, not a promise about your house. The $1,000,000 figure is example math, not a real sale, and part of the gap comes from which homes sell in each season, so one house won't swing the full amount.

Information sounds like

"here's what the data shows, and here's what waiting costs you. Then you decide."

Pressure sounds like

"we need to list by the 15th to catch the window."

In your situation, the math often argues against waiting anyway. Four more months of insurance, utilities, and a care bill arriving every month add up. **Often the best season is simply the one where your family is ready.**

Be careful who shows up

When something happens in a family, the mail starts. Cash-offer letters. Cold calls. People who somehow already know. Some are legitimate. Many aren't, and the model is built on catching a family at the exact moment nobody has the energy to compare.

It hits parents directly too. A senior move manager told me it happens in her field: someone living alone gets quoted a higher price, just because they're alone. If your parents are hiring anyone right now, **get a second quote yourself.**



After closing

The money goes where the trust or estate says. The trustee or executor pays what's owed and distributes the rest by the documents, **with clean records every family member can see.** A sale your family can look back on and understand is what keeps everyone speaking years from now.

Know when the money actually arrives. In a trust sale, there's no court. The trustee pays what's owed and distributes by the trust. In probate, it's different: the sale money waits in an estate account until the judge approves the final accounting, often months after closing. **Nobody in the family is paid from escrow.** Knowing that up front saves a lot of frustration.

Tie up the loose ends. Utilities, insurance, mail, and accounts connected to the house.

Tell the CPA a sale happened. It shows up on next year's taxes, and the CPA needs the records.

Give yourself the emotional part. The closing doesn't close it. Months later, a lot of families still have a storage unit they haven't been able to open, or they find themselves driving past the house. *That's normal. It doesn't mean you did anything wrong.*

What you can hand off

You've now seen every step. That's a lot for one person with a full life, a job, and a family of your own, especially if you live far away.

What only your family can decide:

- What your parents want, and how to honor it
- Who in the family has a say, and how you'll agree
- Which keepsakes matter, and to whom
- Sell, rent, or keep

What someone like me can carry for you:

- Pulling title and finding the gaps before they become problems
- What the house is worth and nets, with both paths priced
- Knowing which question goes to the attorney, the CPA, or the elder law attorney, and making the introductions
- Checking on the house, meeting contractors, coordinating the cleanout, and walking you through it on video if you live far away
- The whole sale, with one shared plan your siblings can see, and updates at every step

The checklist

Your first week

- [ ] Your parent is safe and cared for
- [ ] The papers are found: will, trust, power of attorney, healthcare directive, deed, insurance, any loans
- [ ] You know whose name is on the deed
- [ ] You know who can sign for your parent right now
- [ ] The house is protected: insurance called, locked, mail handled
- [ ] Nothing signed with anyone
- [ ] One family call, and one point person

Getting it straight

- [ ] If the house isn't protected, an estate attorney is involved
- [ ] You know who answers which question
- [ ] You've had the conversation about what your parents want and what they pictured
- [ ] The plan is written down where every family member can see it

Deciding

- [ ] You know what the house is worth and would net
- [ ] If care is needed, you know how it's being paid for
- [ ] The CPA has weighed in on timing
- [ ] Sell, rent, or keep is decided, with the whole cost added up

Getting it ready and selling

- [ ] The new place is measured, if your parent is moving
- [ ] Keepsakes are chosen before anything else goes
- [ ] Only the repairs that pay are made
- [ ] Both paths are priced, and the family chose one

After

- [ ] Funds are distributed with records everyone can see
- [ ] Loose ends are tied up
- [ ] The CPA knows about the sale

Your next step

If you've read this far, you already know more than most families do at this point. You've also seen how much there is, and how much of it only goes right if it's done in the right order.

That's what the Family Home Review is for.

The Family Home Review



It's free, and it doesn't commit you to anything. It starts with a conversation on Google Meet, so it works wherever you live. Join from your phone or computer, and your camera can stay off if you prefer. Bring your siblings if you can. It works best with everyone on the call.

On the call, you talk and I listen. What happened, where things stand, what your parents want, and what's worrying you. Then I answer your questions and walk you through what comes first.

The title report. When you book, I order a title report on your parents' house. It shows whose name is on the deed and whether the house is in a trust. If it comes back before we talk, we go over it on the call. If not, it's on the way, and I'll follow up with what it shows. If there's a trust and the house never made it in, this is where we find out, while it's still fixable.

Then, if you want them, all free and all before you sign anything:

- **A walkthrough of the house,** at a time that works for your family.
- **A Home Value Score,** room by room, from that walkthrough. It shows what's worth fixing, and just as important, what isn't.
- **A full pricing analysis:** what the house would sell for, and what it would net.
- **Introductions to the people you need next,** like an estate attorney, a CPA, or an elder law attorney. I'm always meeting and vetting people who do this work locally, and I'll point you to whoever fits your situation best.

These take a little time to put together, so they come after the call, not before it.

Some families sell right away. Some take longer, and some never sell. All of that is fine.

"So how do you get paid?" I'll say it plainly, because you deserve a plain answer. I do this because some of these families will need a home sold, some soon and some later, and I want to be the one they already trust. That's the whole business model. And if you'd like my help after the Review, I'll show you what that looks like, and you decide.

And when a sale does come

- **The whole map on day one,** in one shared plan your siblings can see, instead of finding out as you go.
- **Both paths priced,** the prepared sale and the cash sale, and you choose.
- **One point of contact** who talks to the attorney, the CPA, and your siblings, so your family isn't repeating itself to four different people.
- **If you live far away,** you don't have to fly in for every step. I can check on the house, meet contractors, coordinate the cleanout, and walk you through it on video.
- **The Cancel Anytime Promise.** You can end our listing agreement on any day, for any reason, without a penalty and without a conversation you have to win. I'd rather earn it every week than hold you to a signature.

> "He gave me real choices instead of steering me toward whatever would close fastest or bring the highest number. When I asked what he would do in my situation, he told me honestly, and it never once felt like pressure. He also raised questions I never would have thought to ask my attorney, and that helped more than he knows."
>
> **BECKY HENZEL**

Book your free Family Home Review

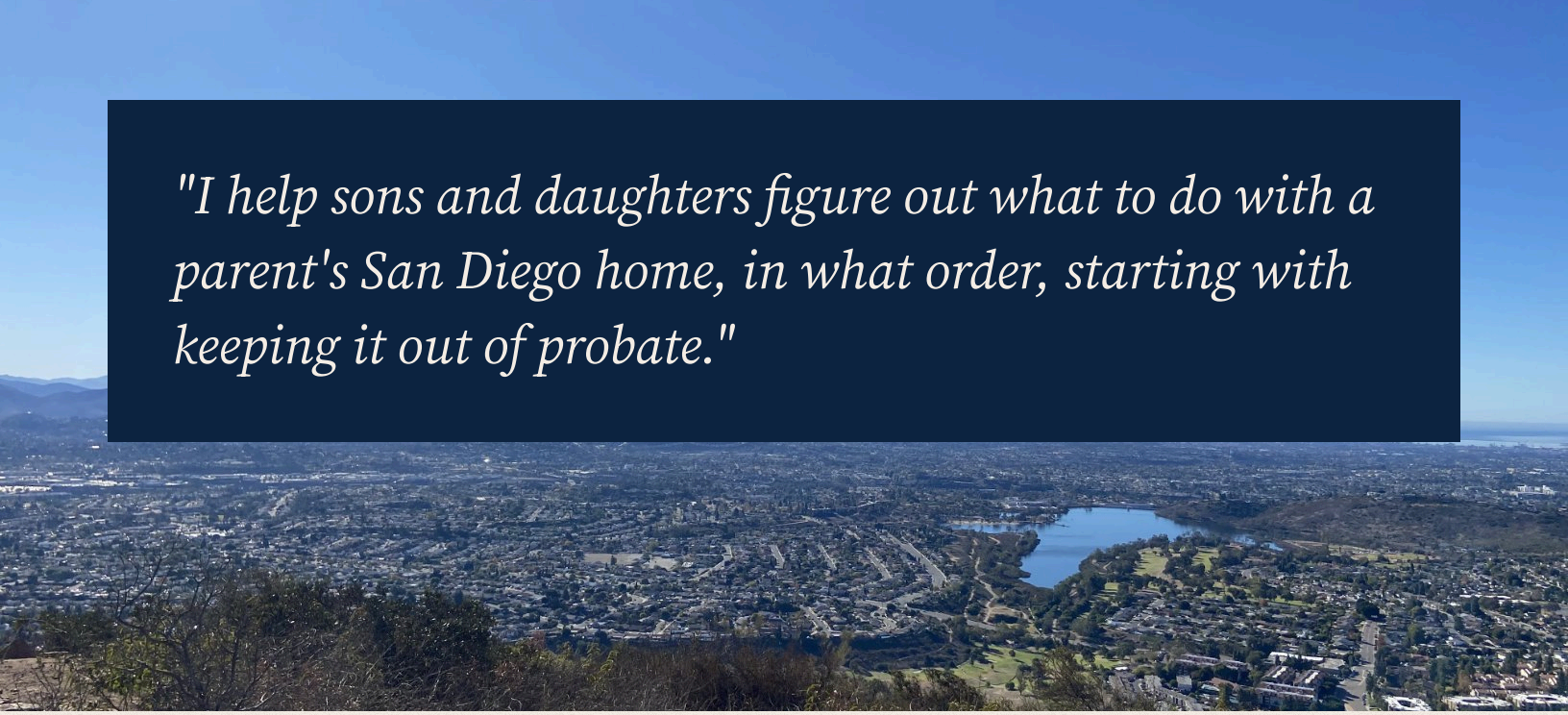
Book your free Family Home Review

It takes a minute. You'll pick a time, share the address of your parents' house so I can order the title report right away, and tell me what's happening right now. It's free, and it doesn't commit you to anything.

"His motto is 'Committed to Excellence, Driven by Love,' and that is not just a tagline. You feel it in how he works."

MICHELLE L.

Committed to Excellence. Driven by Love.



"I help sons and daughters figure out what to do with a parent's San Diego home, in what order, starting with keeping it out of probate."

JESSE MORRISON

TRUST SALES · SENIOR TRANSITIONS

Home market: San Carlos · Del Cerro · La Mesa, Lake Murray side · Santee · Fletcher Hills

---

Jesse Morrison, REALTOR® · HomeSmart Realty West · DRE #01476958

HOMESMART REALTY WEST

EQUAL HOUSING OPPORTUNITY

All information provided is deemed reliable but is not guaranteed and should be independently verified. Market data, property details, and statistics are for informational purposes only and subject to change. Any past sales mentioned do not imply future results. This is not intended as a solicitation if your property is already listed with another broker. HomeSmart supports the principles of Fair Housing Act and Equal Opportunity Act. HomeSmart franchise offices are independently owned and operated.

This guide is general information, not legal or tax advice. For legal questions, talk to an estate or elder law attorney. For tax questions, talk to a CPA.