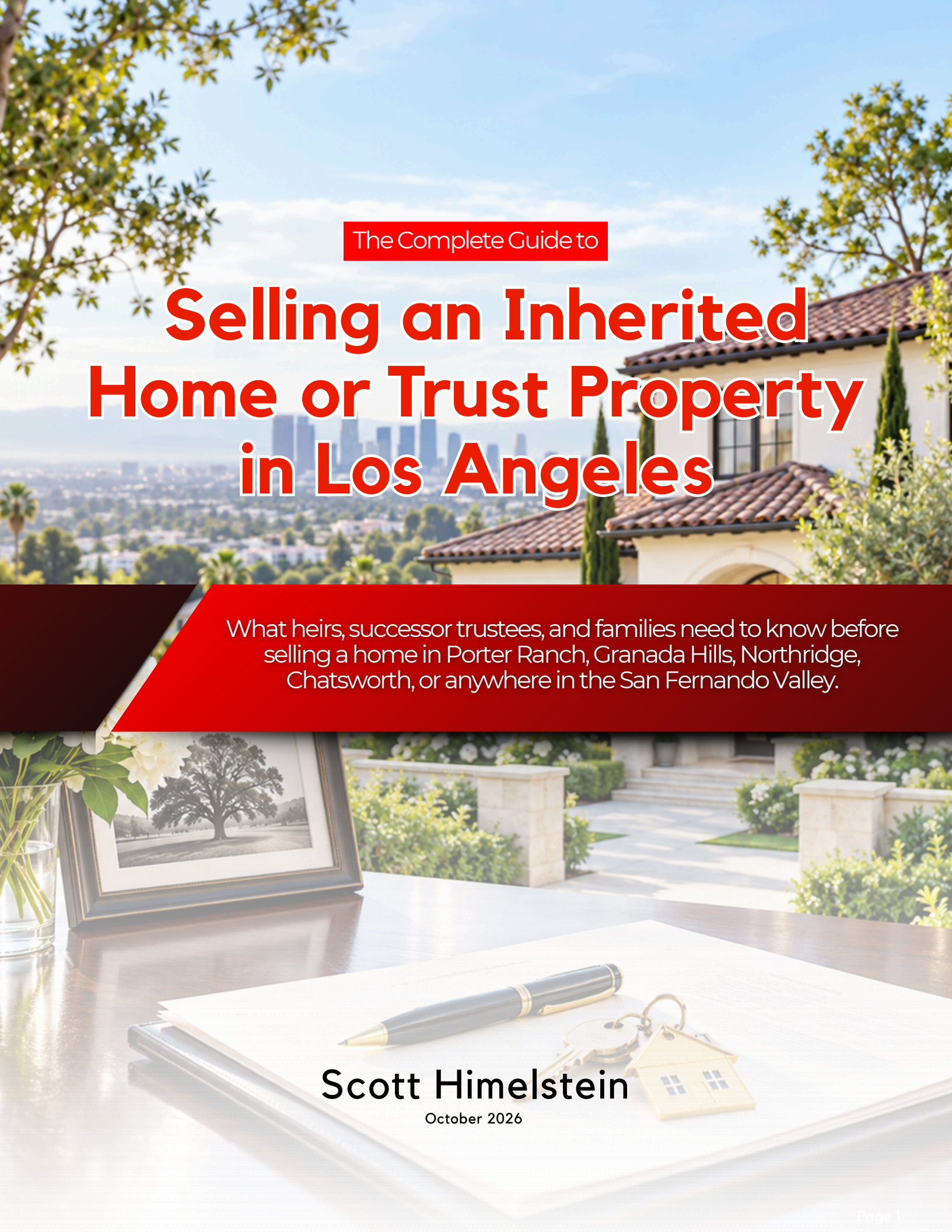


The Complete Guide to

Selling an Inherited Home or Trust Property in Los Angeles

What heirs, successor trustees, and families need to know before selling a home in Porter Ranch, Granada Hills, Northridge, Chatsworth, or anywhere in the San Fernando Valley.

Scott Himelstein

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Contents

Start Here: Which Path Applies to You?

1. You Inherited a Home. Now What?

2. Understanding Trust Sales in California

3. Trust Sale vs. Probate Sale

4. Should You Sell, Rent, or Keep the Property?

5. Selling With Multiple Heirs

6. What If the Property Needs Major Repairs?

7. Preparing a Home Filled With Decades of Belongings

8. How Concierge Plus Can Help

9. Selling From Out of State

10. Understanding Taxes

11. How Much Is Your Inherited Home Worth?

12. The Step-by-Step Selling Process

13. Common Mistakes Families Make

14. Real-Life Case Studies

15. Frequently Asked Questions

16. How the Scott Himelstein Group Helps Families

Welcome

If you have inherited a parent's or loved one's home, you probably have three questions at once: who is allowed to sell it, what needs to happen first, and how to get the best result without it taking over your life. This guide answers all three in plain language.

It is written for adult children, siblings, successor trustees, and out-of-area family members. Most of the homes we help with were bought 20 to 40 years ago, have not been updated in decades, and are full of a lifetime of belongings. That is normal, and it is exactly what this guide is built around.

Why one guide for inherited homes and trust sales? Whether the home passed through a living trust or another form of inheritance, families face the same practical questions: who can sell, what to do with decades of belongings, whether to renovate, how to keep everyone in the family on the same page, and how to get the best price. The legal path is what differs. A properly funded living trust generally lets the successor trustee sell without probate court supervision. A probate sale follows court-supervised procedures and may need court confirmation. That is why we publish two guides:

Guide	Written for
Inherited Home & Trust Sale Guide (this guide)	Heirs, successor trustees, adult children, and out-of-area owners
Probate Home Sale Guide	Executors, administrators, and families going through probate court

How to use this guide

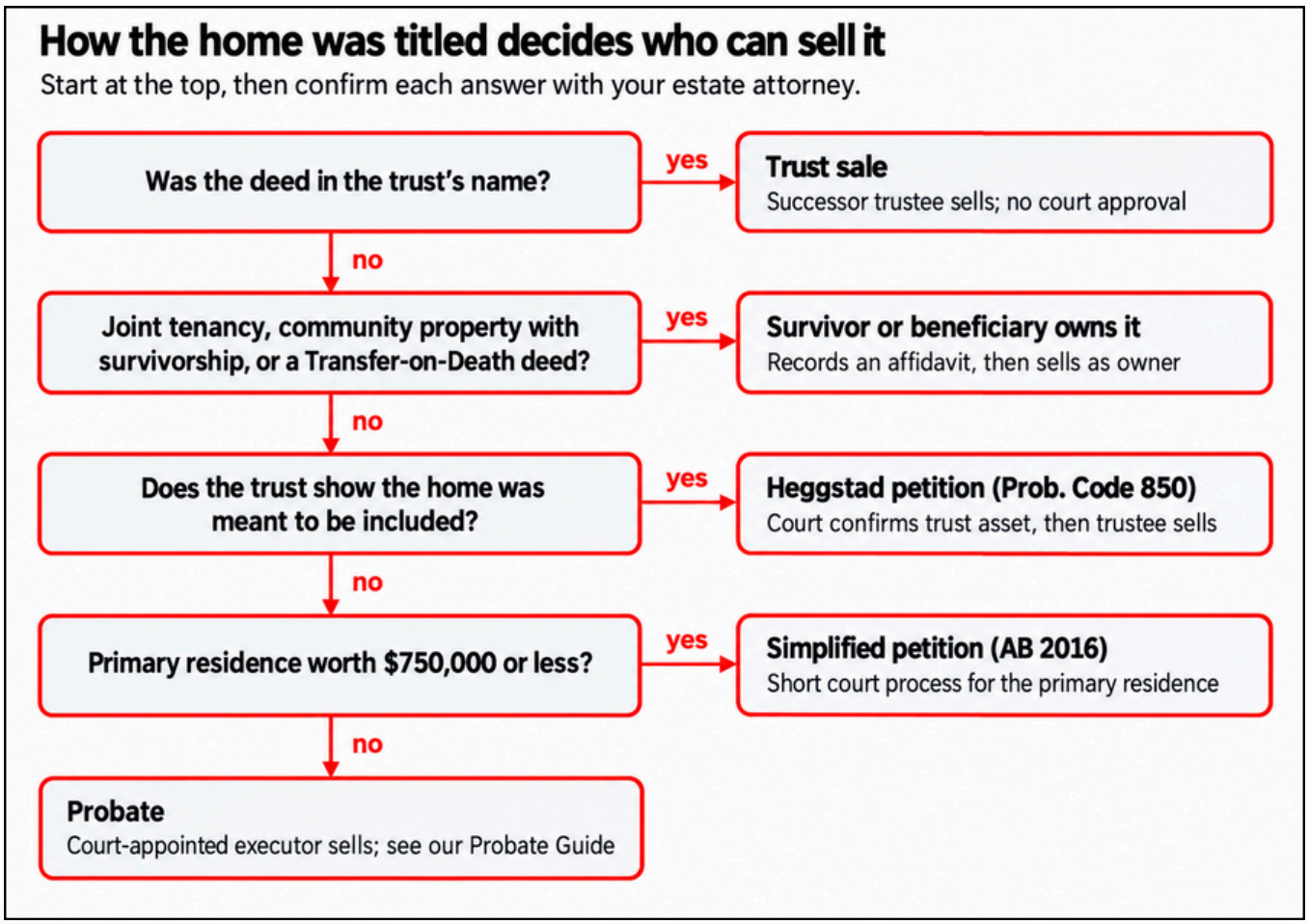
- Start with the decision chart on the next page. It tells you which legal path likely applies and what to ask your attorney.
- If the home was in a living trust, read Sections 2 and 3 closely.
- If the home was not in a trust, our separate Probate Home Sale Guide covers the court process in detail. This guide still applies to everything practical: belongings, repairs, pricing, taxes, and family coordination.
- Sections 4 through 12 walk through every decision from "should we keep it?" to closing day.

> This guide is educational. It is not legal or tax advice. Trustee authority, disclosure duties, and taxes depend on your documents and your family's situation, so confirm those points with a California estate attorney and a CPA.

START HERE

Which Path Applies to You?

Three questions decide almost everything that follows: Did you inherit a home? Was it held in a living trust? Who has the legal authority to sell it? Follow the chart from the top, then take your answers to your estate attorney.



Three questions decide almost everything that follows: Did you inherit a home? Was it held in a living trust? Who has the legal authority to sell it? Follow the chart from the top, then take your answers to your estate attorney.

1. You Inherited a Home. Now What?

In the first 30 days, your job is to protect the property and gather documents, not to sell. Families who rush to list often lose money to avoidable problems: an uninsured vacant house, a missing trust amendment, or a sibling who was never consulted.

Your first-30-days checklist

- □ Order 10 or more certified death certificates. Title companies, banks, insurers, and the county will each want one.
- □ Find the estate planning documents: the trust, any amendments, the will (often a "pour-over" will), and the most recent deed.
- □ Pull the current deed. Check how title is held: in the trust's name, in your parent's name alone, in joint tenancy, or with a Transfer-on-Death deed. This single fact decides the legal path (see the decision chart). Selling an Inherited Home or Trust Property in Los Angeles ' Scott Himelstein Group 4
- □ Call the homeowner's insurance carrier. Tell them the owner has passed and the home may be vacant. Many standard policies limit coverage after 30 to 60 days of vacancy, so ask about a vacant-dwelling policy.
- □ Secure the home. Change or re-key the locks, collect spare keys from neighbors and caregivers, and photograph each room before anything is moved.
- □ Keep utilities on. Power, water, and gas protect the home and are needed for showings, inspections, and appraisals.
- □ Forward the mail and watch for bills: property tax, mortgage or reverse mortgage, HOA dues, and insurance renewals.
- □ Keep paying the mortgage and property taxes. Missed payments add penalties and can start a default.
- □ Don't give away, sell, or throw out belongings yet. Valuables, documents, and items named in the trust need to be identified first.
- □ Talk to a California estate attorney about who has legal authority to act.

Who holds the keys? Until authority is confirmed, nobody should sign a listing agreement or accept an offer. In a trust, that is the successor trustee. In probate, it is the court-appointed executor or administrator. A family consensus is valuable, but it is not legal authority.

2. Understanding Trust Sales in California

If the home was properly titled in a living trust, the successor trustee can usually sell it without going to court. That is the main reason families with trusts can often list, sell, and close in a few months instead of the year or more a probate sale can take.

Who has authority to sell?

The **successor trustee** named in the trust document. When the person who created the trust (the "settlor" or "trustor") dies, a revocable living trust becomes irrevocable, and the successor trustee steps in. Trustees' general power to sell trust property comes from California Probate Code §16226 and from the trust document itself. If two people are named as co-trustees, read the trust carefully. Some require both signatures on every document. If the firstnamed successor has died, declines, or cannot serve, the trust usually names an alternate

Document	Why it matters
The trust and all amendments	Confirms who the trustee is and whether the trust permits or directs a sale
Certified death certificate	Proves the settlor has passed
Recorded deed showing the trust as owner	Confirms the home is actually a trust asse
Certification of Trust (Probate Code §18100.5)	A short summary that title and escrow rely on, so you don't hand over the full trust
Affidavit of Death of Trustee	Recorded with the county to show the change of trustee on title
Trust tax ID (EIN)	Needed for escrow, bank accounts, and tax reporting once the trust is irrevocable

The trustee's legal duties

A successor trustee is a fiduciary. That means acting in the beneficiaries' best interest, not their own. In practice:

- Be loyal and impartial. Treat all beneficiaries fairly.
- A trustee who is also a beneficiary cannot favor themselves, for example by selling the home to themselves below market. Act prudently. Get a credible valuation, market the property properly, and document why you accepted the offer you did.
- Keep beneficiaries informed. Respond to reasonable requests and keep records of income and expenses.
- Keep trust money separate. Sale proceeds go into a trust account, never a personal account.

The 60-day notice and the 120-day window

Within 60 days after the settlor's death, the trustee must mail a formal notice to the beneficiaries and legal heirs (Probate Code §16061.7). That notice starts a clock. A beneficiary generally has 120 days from service (or 60 days after receiving a copy of the trust terms, if later) to contest the trust.

The notice does not legally stop a sale. Many estate attorneys, though, advise trustees to hold off on distributing proceeds until the contest window closes. Preparing the home and going to market during those four months is often a smart use of the time. Ask your attorney how the timing applies to your family.

What if the house never made it into the trust?

This is surprisingly common. Someone signs a trust but never records a new deed. Two options may avoid full probate:

- **A Heggstad petition (Probate Code §850).** If the trust document lists or clearly shows intent to include the home, a court can confirm it belongs to the trust. It is a court step, but much shorter than probate.
- **A Petition to Determine Succession to Primary Residence (AB 2016).** For deaths on or after April 1, 2025, a primary residence valued at $750,000 or less may pass by simplified court petition. Few homes in our neighborhoods fall under that value, but it is worth asking.

If neither applies, the home likely goes through probate. Our Probate Home Sale Guide covers that path.

3. Trust Sale vs. Probate Sale

The difference comes down to one question: how was the home titled when your loved one died? If the deed was in the trust's name, it is usually a trust sale. If it was in their name alone with no other transfer arrangement, it is usually a probate sale.

	Trust sale	Probate sale
Who signs	Successor trustee	Court-appointed executor or administrator
Court involvement	Usually none	Required; the court issues Letters before anything can be sold
Time before you can list	Often weeks, once documents are in order	Often 4 to 9 months in LA County, waiting for court appointment
Typical total timeline	A few months from listing to close	Commonly 12 to 18 months or more for the full estate

	Trust sale	Probate sale
Court confirmation of the sale	No	Sometimes, with an open courtroom overbid
Statutory attorney and executor fees	No; trustee and attorney fees are "reasonable" and often lower	Yes, set by law on the gross estate value (about $46,000 combined on a $1 million estate)
Privacy	Private	Public court file
Buyer experience	Feels like a normal sale	Buyers may face longer escrows and overbid risk

Other ways a home passes outside both paths

- Joint tenancy or community property with right of survivorship. The surviving owner records an affidavit and owns the home outright.
- Transfer-on-Death (TOD) deed. The named beneficiary records an affidavit after death and then owns the home. Some title companies have extra requirements, so check early.
- Simplified petition for a primary residence up to $750,000 (AB 2016). A short court process rather than full probate.

Questions to bring to your attorney

1. How was title held on the date of death?
2. Is the trust valid, signed, and the most recent version?
3. Who is the acting successor trustee, and are there co-trustees?
4. Has the §16061.7 notice gone out, and when does the 120-day window close?
5. Does the trust say to sell the home, distribute it, or leave it to the trustee's discretion?
6. Are there debts, liens, a reverse mortgage, or a Medi-Cal claim that must be paid from the sale?

4. Should You Sell, Rent, or Keep the Property?

For most families with more than one heir, or with heirs who already own a home, selling is the cleanest choice. Since Proposition 19, keeping a parent's home as a rental usually means a much higher property tax bill, and splitting rent and repairs among siblings gets complicated fast.

Option	Works best when	Watch out for
Sell	Several heirs want their share in cash; nobody plans to live there; the home needs work	Timing the sale to the 120-day window and the tax picture

Option	Works best when	Watch out for
Keep and move in	One heir will make it their primary residence within a year	Buying out siblings; Prop 19 only protects value up to a cap
Keep as a rental	One owner, strong cash flow, appetite for being a landlord	Full property tax reassessment; Los Angeles rent rules; repairs; co-owner disputes
One heir buys out the others	One heir wants the home and can finance the buyout	Fair pricing (use an appraisal); trustee conflictof-interest rules

The Proposition 19 question

This is the number every family should ask about before deciding to keep the home. Under Proposition 19 (effective February 16, 2021), a child can keep a parent's low property tax base only if:

- The home was the parent's primary residence, **and**
- The child moves in as their own primary residence within one year, **and**
- The child files for the homeowners' exemption.

Even then, the protection is capped. For transfers from February 16, 2025 through February 15, 2027, a home can be worth up to the parent's taxable value **plus $1,044,586** before the excess is reassessed. Rentals, second homes, and homes no child moves into are reassessed to current market value.

Example. Your parents bought in Granada Hills in 1988. The home's assessed value today might be around $250,000, so the property tax is roughly $3,000 a year. If it is reassessed at $1,000,000, the bill rises to roughly $12,000 a year or more, before any special assessments. That difference often decides whether keeping it as a rental makes sense.

Carrying costs while you decide

Every month the home sits, the family pays for it. Typical monthly costs include property taxes, insurance (often higher for a vacant home), utilities, gardening, pool service, HOA dues, and basic maintenance. Write these down early so every heir sees the real cost of waiting.

5. Selling an Inherited Home With Multiple Heirs

The trustee has the legal authority, but the sale goes best when every heir sees the same information at the same time. Most family disputes over an inherited home start with someone feeling left out, not with the price.

What works

- **Hold one kickoff call with everyone.** Cover who the trustee is, what the trust says, the timeline, and what the home is likely worth.
- **Share one set of numbers.** A written market analysis, a list of carrying costs, and repair estimates, sent to all heirs together.
- **Agree on how decisions get made.** Who approves the list price? Who signs off on improvements? How fast must people respond?
- **Put agreements in writing.** A short email confirming each decision prevents "I never agreed to that" later.
- **Plan the personal items early.** Let each heir tag items they want before any cleanout begins. Use photos for out-oftown family.

Common sticking points, and how families resolve them

Sticking point	A practical way through
One sibling wants to keep the house	Get an independent appraisal and price a buyout. If they can't finance it, the sale proceeds.
One heir is living in the home	Agree in writing on a move-out date, and whether they pay rent or carrying costs in the meantime. Talk to the attorney first.
Disagreement over spending on repairs	Compare the as-is price with the after-improvement price, net of cost. Concierge Plus (Section 8) removes the need for anyone to front the money.
"We should wait for the market"	Put carrying costs on paper. Waiting 12 months often costs more than the market is likely to move.
Heirs who are slow to respond	Set response deadlines in the kickoff agreement. The trustee can act within their authority.

If an heir refuses to cooperate or threatens a contest, stop and talk to the estate attorney before moving forward. The trustee's authority is strong, but it is not unlimited, and the attorney can explain options such as a court petition for instructions.

6. What If the Property Needs Major Repairs?

You are never required to renovate an inherited home before selling it. The real question is whether a targeted set of improvements will add more to the sale price than it costs. For many dated Valley homes, it does.

Selling as-is vs. preparing for market

	Sell as-is	Prepare, then sell
Typical buye	Investors, flippers, cash buyers	Owner-occupant families, the largest buyer pool
Speed	Fastest; can close in 2 to 4 weeks	Adds a few weeks of work before listing
Upfront cost	None	Varies; with Concierge Plus, nothing upfront
Price	Discounted for the buyer's risk and profit	Closer to full market value
Best fit	Severe structural problems, major unpermitted work, or a family that values speed above all	Sound homes that look dated: original kitchens, worn floors, old paint

Improvements that usually pay off

- Fresh interior paint in neutral colors
- New flooring or refinished hardwood
- Updated light fixtures and hardware
- Landscaping cleanup and curb appeal
- Minor kitchen and bath refreshes: counters, faucets, cabinet paint
- Repairs that buyers' inspectors will flag: leaks, broken windows, electrical hazards

Improvements that usually don't

- Full kitchen or bath remodels with long timelines
- Room additions or layout changes that need permits and plan check
- Highly personal design choices

Inspect before you decide

A pre-listing inspection, and often a sewer lateral camera inspection and termite report, tells you what you're dealing with before a buyer does. Problems discovered by the buyer's inspector usually cost more in price reductions than they would to fix or disclose up front.

A note on disclosures

Some trustees selling in the course of trust administration are exempt from the standard Transfer Disclosure Statement under Civil Code §1102.2(d). That exemption does not apply when the trustee is a former owner of the home or lived there in the past year, which is common when an adult child was a caregiver. Even exempt sellers must still disclose known material facts and provide required hazard and local disclosures. Your attorney and your agent should confirm which forms apply.

7. Preparing a Home Filled With Decades of Belongings

Clearing a parent's home is often the hardest part emotionally and the biggest bottleneck practically. A clear order of operations keeps it from dragging on for months.

A cleanout in five stages

1. **Search for documents and valuables first.** Before anything leaves the house, look for wills, trust amendments, deeds, bank and brokerage statements, insurance policies, safe deposit keys, jewelry, cash, and collectibles. People hide things in books, freezers, closets, and garages.
2. **Let family choose.** Give each heir a set window to tag what they want. Photograph items for family who live out of the area, and record who takes what.
3. **Appraise and sell what has value.** An estate sale company or appraiser can identify furniture, art, tools, and collectibles worth selling. Estate sale companies typically work on a commission from the proceeds.
4. **Donate.** Charities pick up usable furniture and household goods. Keep receipts; the trust or estate may be able to use them.
5. **Haul away the rest.** A junk removal crew finishes the job, followed by a deep clean.

What to keep, at least for now

- Tax returns and financial records from recent years
- Anything related to the house: permits, warranties, receipts for improvements (these can affect tax basis and disclosures)
- Photos, letters, and family keepsakes, until every heir has had a chance to see them

Who does what

Vendor	What they do
Estate sale company	Prices, stages, and runs a public sale of contents
Personal property appraiser	Values art, jewelry, and collectibles for sale, division, or tax records
Donation pickup	Removes usable goods at little or no cost
Junk removal	Hauls everything left
Cleaning crew	Deep clean before photos and showings
Storage or moving company	Holds or ships items for heirs

We coordinate these vendors for our clients, from the first walkthrough to a broom-clean house ready for photos. For families who live out of the area, that often means the cleanout happens without anyone flying in.

8. How Concierge Plus Can Help

Concierge Plus lets your family make the improvements that raise a home's sale price without paying anything upfront. It solves the most common problem we see with inherited homes: the house would sell for much more with updates, but nobody in the family wants to front the money or manage contractors.

How it works

1. **Walkthrough and plan.** We walk the home with you and identify the improvements most likely to increase the sale price, and the ones that aren't worth it.
2. **Pricing both ways.** We show you an estimated as-is price and an estimated after-improvement price, so the family can see the expected return before deciding.
3. **No upfront cost.** Work begins without the trust or the heirs paying out of pocket.
4. **Negotiated contractor pricing.** We use trusted local vendors at pricing we have negotiated, and we manage the schedule and quality.
5. **Six months, no interest.** The improvement costs are repaid under a six-month, no-interest arrangement, typically from sale proceeds at closing.
6. **We handle it.** Painters, flooring, landscaping, cleaning, staging, and repairs are coordinated by our team, with photo updates for heirs who live away.

Why it matters for inherited homes

- **No one sibling carries the cost.** Repairs don't depend on whoever can write the biggest check.
- **Trust cash stays put.** The trustee doesn't have to drain trust accounts that may be needed for taxes, debts, or final expenses.
- **Faster decisions.** When the money question is off the table, families agree on improvements much more easily.
- **A larger buyer pool.** A refreshed home appeals to owner-occupant buyers, not just investors looking for a discount.

> Program terms to confirm before publishing: eligibility requirements, what happens if the home doesn't sell within six months, any caps on project size, and whether a written agreement is signed by the trustee. Trustees should review the agreement with their attorney, since they are committing trust assets.

9. Selling an Inherited Property From Out of State

A successor trustee can sell a Los Angeles home without living here, and often with one trip or none. Most of the work can be signed electronically or notarized wherever you are.

What can be done remotely

- Listing agreement and disclosures: electronic signature
- Offers, counteroffers, and escrow instructions: electronic signature
- Grant deed and other recorded documents: signed before a notary near you, or through a mobile notary, then overnighted to escrow (some title companies also accept remote online notarization; confirm with escrow first)
- Sale proceeds: wired to the trust's bank account

What a local team handles for you

- Securing the home, changing locks, and checking on it weekly
- Meeting vendors, inspectors, appraisers, and contractors
- Coordinating the cleanout and shipping items to family
- Photo and video walkthroughs at each stage
- Managing showings, open houses, and buyer inspections

Tips for out-of-area trustees

- Set up a trust bank account early, ideally with a bank that has branches in your state.
- Choose one point of contact for the family and one for the property.
- Agree on a weekly update schedule: a short call or written summary with photos.
- Watch for wire fraud. Always confirm wiring instructions by phone with the escrow officer, using a number you already know, never one from an email.

10. Understanding Taxes When Selling an Inherited Home

For most families, selling an inherited home soon after a death triggers little or no capital gains tax, thanks to the stepped-up basis. The bigger tax surprises usually come from waiting, renting the home out, or property tax reassessment. Always confirm your situation with a CPA.

The stepped-up basis

When someone inherits a home, its tax "cost" generally resets to its fair market value on the date of death (Internal Revenue Code §1014). Decades of appreciation are not taxed.

Example. Your parents bought their Northridge home in 1985 for $150,000. It was worth $1,050,000 when the surviving parent died. If the trust sells for $1,080,000, taxable gain is measured from $1,050,000, not $150,000. After selling costs, there may be little or no gain at all.

- **Community property:** when the first spouse dies, both halves of community property can receive a full step-up. This matters if the surviving spouse sells.
- **Joint tenancy:** usually only the deceased owner's half is stepped up.
- **Get a date-of-death appraisal.** A written appraisal as of the date of death is the best evidence of your new basis if the IRS ever asks.



Capital gains after inheritance
Any increase in value between the date of death and the sale can be taxable. Holding the home for years as a rental increases that exposure. Selling within a reasonable time after death keeps it small.



Estate tax
California has no estate or inheritance tax. The federal estate tax exemption is $15 million per person in 2026, so most families owe none. Very large estates should get advice early.



Property tax (Proposition 19)
If no child moves in, the home is reassessed to market value. That usually doesn't matter if you sell promptly, but it affects the property tax bills you pay while the home is on the market. See Section 4.



Income tax returns for the trust
Once a trust becomes irrevocable, it gets its own tax ID and may need to file federal Form 1041 and California Form 541 for income it earns, including any gain on the home sale.



California withholding at closing
Escrow normally withholds 3⅓% of the sale price for California income tax. A full exemption is available when the home was the decedent's principal residence and is sold by the decedent's estate or trust (claimed on FTB Form 593). Tell your escrow officer early so it's handled correctly.



Transfer taxes in Los Angeles
Porter Ranch, Granada Hills, Northridge, and Chatsworth are inside the City of Los Angeles, so sales there pay both county and city transfer taxes.

Tax	Rate
Los Angeles County documentary transfer tax	$1.10 per $1,000 of price
City of Los Angeles transfer tax	$4.50 per $1,000 of price
Measure ULA (City of LA), closings on or after July 1, 2026	4% on sales over $5.4 million; 5.5% on sales of $10.9 million or more

ULA thresholds adjust every July 1. Most homes in our area sell well below them, but larger estate properties should check.

> Tax rules change and depend on your specific facts. Use this section to prepare questions for your CPA, not to make final decisions.

11. How Much Is Your Inherited Home Worth?

An inherited home that hasn't been updated in 20 to 40 years has two values: what it's worth today as-is, and what it could be worth after the right improvements. Knowing both before you accept any offer is the most important pricing step a family can take.

Why online estimates miss

Automated estimates assume a home is in typical condition. They can't see an original 1970s kitchen, a new roof, a cracked slab, or an unpermitted garage conversion. On dated homes, they can be off by a wide margin in either direction.

How we price an inherited home

1. **Walk the home in person.** Condition, layout, lot, views, and anything a buyer's inspector will find.
2. **Pull comparable sales on both ends.** Recent sales of similar homes in original condition and in updated condition, in the same neighborhood.
3. **Estimate the gap.** The difference between those two values, minus the cost of improvements, shows whether preparation is worth it.
4. **Factor in the market.** Season, inventory, interest rates, and how quickly similar homes are selling.
5. **Recommend a strategy.** As-is, light preparation, or full Concierge Plus preparation, with the expected net to the trust for each.

Valuations you may need, and why

Valuation	Purpose
Date-of-death appraisal	Sets the stepped-up tax basis; useful for trust accounting
Broker's market analysis	Guides the list price and the improve-or-not decision
Appraisal for a sibling buyout	Gives a neutral, defensible price between family members
Buyer's lender appraisa	Required by the buyer's lender; we help support the price with comparables

A trustee who documents how the price was set, and why an offer was accepted, is in a much stronger position if a beneficiary ever questions the sale.

12. The Step-by-Step Selling Process

A well-run trust sale moves through ten steps, from confirming authority to distributing proceeds. Timing varies by family, but preparation and the 120-day notice window can usually run side by side.

1. **Confirm authority.** The estate attorney confirms the home is a trust asset and who the acting trustee is. The trustee signs a Certification of Trust and records an Affidavit of Death of Trustee.
2. **Send the trustee's notice.** The attorney serves the §16061.7 notice within 60 days of death, starting the 120-day contest window.
3. **Secure and insure the home.** Locks, vacant-property insurance, utilities, and regular checks.
4. **Value the home.** A date-of-death appraisal for taxes, and a market analysis showing as-is and improved values.
5. **Clear the home.** Family picks items, then estate sale, donation, haul-away, and deep clean (Section 7).
6. **Prepare the home.** Inspections and targeted improvements, with Concierge Plus if the family chooses (Sections 6 and 8).
7. **Market the home.** Professional photography, video, staging where it helps, online launch, open houses, and outreach to local agents and buyers.
8. **Review offers.** We compare price, financing strength, contingencies, and timeline. The trustee accepts the offer that best serves the beneficiaries and documents why.
9. **Escrow and closing.** Buyer inspections and appraisal, disclosures, loan approval, signing the grant deed, and recording. Escrow pays off any mortgage, liens, and approved costs, including Concierge Plus repayment.
10. **Distribute proceeds.** Net proceeds go to the trust account. The trustee pays final expenses and taxes, prepares an accounting, and distributes to beneficiaries as the trust directs, usually after the contest window has closed and with the attorney's guidance

A typical timeline for a trust sale

Phase	Typical lengt
Documents, notice, and securing the home	2 to 6 weeks
Cleanout	2 to 6 weeks
Improvements (if any)	2 to 8 weeks
On market to accepted offer	Varies with the market; often 1 to 6 weeks
Escrow	Usually 21 to 45 days

These are ranges from typical transactions, not promises. A home with a stalled cleanout or a family disagreement can take longer, and a ready, well-priced home can move faster.

13. Common Mistakes Families Make

The costliest mistake is accepting the first offer before anyone has assessed what the home could sell for. "We buy houses" letters and calls often arrive within weeks of a death, and they are priced for the buyer's profit, not yours.

1. Accepting an offer before assessing the home's potential. Get an as-is and an improved valuation first.
2. Signing before authority is confirmed. A listing or purchase agreement signed by the wrong person can unravel.
3. Letting the insurance lapse or ignoring vacancy rules. A burst pipe in an uninsured vacant house can wipe out a large share of the equity.
4. Throwing things out too early. Trust amendments, deeds, and valuables turn up in unexpected places.
5. Moving money through personal accounts. Trust funds belong in a trust account, every time.
6. Distributing proceeds too soon. Pay debts, taxes, and expenses first, and get the attorney's go-ahead.
7. Skipping the date-of-death appraisal. It is the best proof of your stepped-up basis.
8. Over-renovating. A full remodel rarely returns its cost. Targeted improvements usually do.
9. Assuming the trust sale is exempt from all disclosures. Known material facts must still be disclosed.
10. Leaving heirs in the dark. Lack of information, more than disagreement, is what turns families against each other.
11. Letting a relative live in the home without a written agreement. It can stall the sale for months. Selling an Inherited Home or Trust Property in Los Angeles ‧ Scott Himelstein Group 15
12. Underestimating carrying costs. Taxes, insurance, and utilities add up quickly while the family decides.
13. Trusting wiring instructions from an email. Always confirm by phone with escrow.

14. Real-Life Case Studies

Every inherited home is different, but the decisions follow the same pattern: assess the home honestly, invest only where buyers will pay for it, and let the results speak. These examples show how that works in practice.

Case Study 1:

Selling an Inherited Porter Ranch Home As-Is for $150,000 Over Asking Price



Situation

The sellers inherited their mother's home in Porter Ranch, California, after her passing. One lived in Utah and the other in San Diego, making it difficult to manage the property and coordinate the sale remotely.

Challenge

The home needed extensive repairs, including damaged flooring, roof replacement, and addressing water stains and visible mold. It was also filled with years of accumulated belongings. The sellers needed a way to sell the property without spending thousands on renovations or handling the cleanout themselves.

What We Did and Why

- Coordinated the property cleanout: Arranged for a professional haul-away team to remove four trailers of unwanted belongings, reducing the burden on the out-of-area sellers.
- Provided transparency: Obtained a pre-listing home inspection, roof replacement estimate, termite inspection, and sewer line inspection to help buyers understand the property's condition.
- Prepared the home for marketing: Had the property professionally cleaned so buyers could better see its potential.
- Priced strategically: Recommended an aggressive asking price to attract serious buyers and encourage multiple offers without investing in major renovations.

Result

- 14 offers received
- Sold for $150,000 over asking price
- Sold in less than one week
- Four trailers of unwanted belongings removed
- Multiple buyers waived inspection contingencies, including the accepted buyer

The sellers avoided major renovation expenses and the stress of managing the cleanout and sale from out of town, while achieving a competitive sale price.

Case Study 2:

Selling a Van Nuys Trust Property From Across the Country, $46,000 Over Asking



Situation

After a homeowner passed away, a family member living in North Carolina became the successor trustee responsible for selling the property in Van Nuys, California. They were unfamiliar with the California trust sale process and needed guidance managing the sale from across the country.

Challenge

The property was filled with unwanted furniture and personal belongings, and the backyard was severely overgrown. The successor trustee was unsure about the required paperwork, obtaining a trust EIN, and coordinating the sale remotely without making unnecessary trips to California.

What We Did and Why

- Guided the trustee through the process: Explained the real estate steps, required paperwork, and timeline to make the unfamiliar process easier to navigate.
- Assisted with obtaining a trust EIN: Helped the trustee secure the federal tax identification number needed for the trust's circumstances.
- Coordinated property preparation: Arranged for the removal of unwanted belongings, landscaping, professional cleaning, and pre-listing inspections to prepare the home for the market.
- Managed escrow coordination: Helped organize important transaction documents to minimize the trustee's need to return to California.

Result

- Sold in just 14 days
- Sold for $46,000 over asking price
- Successfully guided the successor trustee through an unfamiliar trust sale
- Coordinated property preparation and transaction logistics remotely
- Minimized unnecessary travel and reduced the burden on the trustee

Case Study 3:

Selling a Porter Ranch Trust Property With Our Concierge Plus Home Renovation Program



Situation

A family needed to sell a home held in a trust in Porter Ranch, California. The property required significant updates and preparation before it could be marketed, and the family felt overwhelmed by the amount of work involved.

Challenge

The home needed a complete cleanout, new flooring, interior painting, remodeled bathrooms, backyard cleanup, and professional staging. The family didn't know where to start and wanted to avoid the time and stress of selecting materials, hiring contractors, and coordinating multiple vendors.

What We Did and Why

- Coordinated the property cleanout: Arranged for unwanted belongings to be removed so the home could be prepared for renovations.
- Managed renovations through Concierge Plus: Coordinated new flooring, interior painting, bathroom remodels, and backyard cleanup to improve the home's appeal to buyers.
- Handled contractor and material coordination: Managed flooring selections, paint colors, bathroom vanities, finishes, and contractors to reduce the family's workload.
- Provided complimentary professional staging: Arranged staging at no additional cost to highlight the home's updated features and help buyers visualize the space.
- Prepared and marketed the home: Brought the renovated and staged property to market with a pricing and marketing strategy designed to attract buyers seeking move-in-ready homes.

Result

- Sold in just 14 days
- Complete property cleanout coordinated
- New flooring installed throughout the home
- Interior painting completed
- Bathrooms remodeled
- Backyard cleaned up
- Complimentary professional staging provided
- Renovations and preparation managed through the Concierge Plus Program

The family was able to sell the trust property without personally managing renovations, selecting materials, or coordinating contractors and staging.

15. Frequently Asked Questions

1.Can a successor trustee sell a house without going to court in California?
Usually, yes. If the home was titled in the trust, the successor trustee can generally sell it without probate court approval, under the trust's terms and Probate Code §16226.

2. Do all beneficiaries have to agree to sell a trust property?
Not usually. The trustee has the authority, though they must act in all beneficiaries' best interests. Keeping beneficiaries informed avoids most conflicts.

3. How long does it take to sell a house in a trust after death?
Often a few months from gathering documents to closing, depending on cleanout, repairs, and the market. Probate sales commonly take far longer.

4. Can I sell during the 120-day contest period?
The notice doesn't legally block a sale, but many attorneys advise waiting to distribute proceeds until it closes. Ask your attorney.

5. What if the house was never transferred into the trust?
A Heggstad petition (Probate Code §850) may confirm it belongs to the trust. Otherwise, it may need probate or a simplified petition if it's a primary residence worth $750,000 or less.

6. Do I pay capital gains tax when I sell an inherited house?
Often little or none if you sell soon, because the tax basis usually steps up to the value at death. Gain after the date of death can be taxable.

7. Will the property taxes go up when I inherit my parents' home?
Yes, unless a child moves in as their primary residence within a year and qualifies under Proposition 19, and even then only up to a value cap.

8. Should I fix up an inherited house before selling it?
Only if the improvements are likely to add more than they cost. We show you both numbers before you decide.

9. Can I sell an inherited house as-is?
Yes. It's often the fastest route, but usually at a lower price. Known material problems must still be disclosed.

10. Does a trustee have to fill out seller disclosures?
It depends. Some trustees are exempt from the standard Transfer Disclosure Statement, but not if they lived in or previously owned the home. All sellers must disclose known material facts.

11. What do I do with everything in my parents' house?
Search for documents and valuables, let family choose, then estate sale, donate, and haul away the rest. We can coordinate the vendors.

12. Can I sell an inherited house in Los Angeles if I live out of state?
Yes. Most documents can be signed electronically or before a local notary, and a local team manages the property.

13. What if a sibling is living in the house?
Talk to the estate attorney first. A written agreement on a moveout date and expenses usually resolves it.

14. What if one heir wants to keep the house?
They can buy out the others at a fair, appraised price. If they can't finance it, the trustee can proceed with a sale.

15. Who pays the mortgage while the house is being sold?
The trust, from trust funds if available. Keep paying to avoid penalties or default.

16. What if there's a reverse mortgage?
The loan generally becomes due after the borrower's death. Contact the servicer right away; heirs typically have a limited window to sell or pay it off.

17. How is the sale price split among heirs?
As the trust directs, after the mortgage, costs, debts, and taxes are paid from the proceeds.

18. Does escrow withhold California tax on an inherited home sale?
Normally 3⅓% is withheld, but there's an exemption when the home was the decedent's principal residence and is sold by the estate or trust.

19. Can the trustee be paid?
California allows reasonable trustee compensation unless the trust says otherwise. Many family trustees waive it.

20. Do I need a lawyer to sell a house in a trust?
We strongly recommend one for confirming authority, the trustee's notice, and distribution. The real estate side is where we help.

16. How the Scott Himelstein Group Helps Families

We handle the real estate side of an inherited home from the first walkthrough to the final wire, so the trustee and family can focus on each other. We work alongside your estate attorney and CPA, never in place of them

What we do

- **Local knowledge.** We know Porter Ranch, Granada Hills, Northridge, Chatsworth, and the wider San Fernando Valley street by street, including how dated homes and updated homes actually sell here. Selling an Inherited Home or Trust Property in Los Angeles ' Scott Himelstein Group 18
- **Two-price analysis.** You see the as-is value and the improved value before you make any decision.
- **Concierge Plus.** Improvements with no upfront cost, negotiated contractor pricing, and six months with no interest.
- **Vendor coordination.** Estate sale, donation, haul-away, cleaning, repairs, staging, and photography, managed by one team.
- **Family communication.** Regular updates for every heir, wherever they live.
- Full-service marketing and negotiation. Professional presentation, broad exposure, and offers evaluated on more than price.
- **Experience with trusts and probate.** We understand trustee documents, the notice timeline, and what title and escrow need, and we coordinate with your attorney.

[Add: years in business, number of trust/inherited/probate sales, designations, and team members.]

Your next step

Schedule a no-obligation consultation. We'll walk the home with you (in person or by video), explain your options, and give you a written estimate of its value as-is and after improvements.

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Also available: our Probate Home Sale Guide, for executors and administrators navigating the Los Angeles probate court

Important Disclaimer

This guide is for general educational purposes only and is not legal, tax, or financial advice. Laws, tax thresholds, and local rules change. Trustee authority, disclosure obligations, tax treatment, and probate alternatives depend on your documents and circumstances. Consult a licensed California estate attorney and a CPA before acting. The Scott Himelstein Group is a real estate team, not a law firm or tax advisor. Figures are current as of October 2026.

> Before publishing: have a California estate attorney review Sections 1–3, 6, 12, and 15 (trustee authority, notice, disclosures, probate alternatives) and a CPA review Sections 4 and 10 (Prop 19 and taxes).

Sources

- California Probate Code §16061.7, trustee notification and 120-day contest period
- California Civil Code §1102.2, disclosure exemptions
- Daily Journal, exempt fiduciary sellers and their duty to disclose
- Board of Equalization, Prop 19 exclusion adjusted to $1,044,586
- Board of Equalization Publication 800-1, parent-child exclusion
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