



# CHRISTIAN BUITRON

Probate Specialist

## The Probate Asset Roadmap

A General Manager's Workflow for Attorneys & Estate Fiduciaries

### My Role: The Probate General Manager

For a busy attorney, the most valuable asset is time. When an estate includes physical property, your legal expertise is suddenly diluted by the friction of non-legal problems:

My role is to **absorb 100% of this friction**. I am not just a real estate agent; I am your **on-the-ground General Manager** for all physical assets. You handle the courtroom and the code; I handle the concrete, the clean-out, and the closing. This document is my operational playbook.

# Phase 1: Secure, Inventory, & Value (The First 72 Hours)

My process is designed to bring order to the chaos of probate. My first priority is to protect the estate's assets and provide you with the accurate data needed for all court filings, ensuring every step is documented and optimized for the estate's best interest.



- **1. Secure the Asset:** I am the first call. I immediately coordinate the re-keying of all locks to secure the real estate from unauthorized access.



- **2. Inventory Personal Property:** I conduct a full walkthrough with the Personal Representative to photograph and inventory all high-value personal items (cars, jewelry, art, collectibles).
- **3. Coordinate All Valuations:** I manage the entire appraisal process so you don't have to.
  - **The "Probate Referee Package":** I am the referee's single point of contact. To prevent the common "drive-by over-valuation," I provide them with a full **Appraisal Package** including:
    - Interior and exterior photos of the property's true condition.
    - A list of all known defects and required repairs.
    - Vendor bids and repair estimates.
    - This ensures a fair and accurate "date of death" valuation for the tax basis.
  - **Specialized Assets:** I coordinate with auction houses and specialized appraisers for vehicles, art, and jewelry to get accurate values for the **Inventory and Appraisal (Form DE-160)**.

## Phase 2: Strategy & Execution (The '3 C's')

With the assets secure, we move to maximizing their value. I present a clear plan to the Personal Representative and manage all operations.



- **1. Clean-Out:** I manage the entire "personal property" phase.
  - Coordinate with heirs to select and retrieve sentimental items.
  - Hire and supervise estate sale companies, auctioneers, or consignment partners.
  - Manage final junk hauling and donation services.



- **2. Construction (Repairs):** I provide a clear "Repair vs. Return" analysis. I get multiple bids for all work—from new paint to foundation work—and manage the chosen contractors from start to finish.



- **3. Communication:** You and the Personal Representative receive **one simple, comprehensive weekly update** from me. You are never in the dark, but you are never bothered by minor details.

## Phase 3: The Court-Compliant Closing

This is where my specialization is most critical. I am an expert in the nuances of the probate real estate sale, protecting the estate from costly errors.

- **Navigating Authority:**
  - **Full Authority (IAEA):** I run a strategic, fast-paced marketing campaign to generate the highest possible price, managing all probate-specific disclosures and timelines.
  - **Limited Authority (Court-Supervised):** I am an expert in the court-confirmation process. I manage the specific marketing requirements, prepare the buyer for the over-bid process at the hearing, and ensure all court documentation is flawless.
- **Attorney Support:** I provide you with all necessary documentation for legal filings, such as repair bids for a **Notice of Proposed Action (NOPA)** or final utility bills for the accounting.
- **Closing the File:** I ensure a smooth closing by coordinating with escrow, the title company, and the Personal Representative, delivering a complete file to you at the end.

### My Differentiators

- **Single Point of Contact:** You make one call. I handle everything else.
- **Appraisal Management:** My "Probate Referee Package" protects the estate from inaccurate valuations that can complicate tax liability and sales.
- **Expert in Court-Supervised Sales:** I understand the "Limited Authority" sale and will never fumble the court confirmation, preventing delays and saving the estate money.
- **Neutral Third-Party:** I am a buffer between the Personal Representative and emotional heirs, de-escalating conflict with data, transparency, and professionalism.

# Why a Probate Specialist is Non-Negotiable

Any agent can list a house. Only a specialist can successfully navigate the legal, financial, and emotional complexities of an estate.

- Coordinating appraisers and locksmiths.
- Getting bids for junk haulers and contractors.
- Managing emotional family members in different time zones.
- Navigating the complex, court-specific real estate sale.

## "Cautionary Tales": The Cost of Inexperience

- **The Over-Valued Appraisal:** A "drive-by" referee valued a probate home at \$1.5M based on its curb appeal. The interior was destroyed. It took 4 months of appeals and new appraisals to correct the value, delaying the sale and causing immense stress for the family. **My process avoids this.**
- **The Fumbled Court Sale:** An agent unfamiliar with "Limited Authority" failed to properly advertise the court confirmation hearing. The judge rejected the sale, the buyer walked, and the property had to be re-listed, costing the estate 8 extra months in holding costs and market decline. **I am an expert in this process.**
- **The Family Feud:** In one estate, an heir in financial trouble wanted a quick, low-ball investor sale, while the Personal Representative wanted to repair the home for a retail price. The resulting infighting nearly led to litigation. I was brought in to provide a neutral, third-party "Repair vs. Return" analysis, showing the data for both options, which allowed the family to make a logical, unified decision.

## Let's Partner

My system is designed to integrate seamlessly with your legal practice, making your job easier and creating a professional, compassionate experience for your clients. I am ready to be your go-to resource.



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