Estate Cleanout Checklist

General information, not legal, tax, or financial advice. Rules vary by state and by whether property is in probate or a trust. Get written quotes for paid services.

Phase 1: Before you remove anything

- [ ] Confirm who has legal authority over the property (executor, administrator, or successor trustee). See the California Courts Self-Help Center or your state court's site, and What to Do After a Loved One Dies.
- [ ] Order certified copies of the death certificate (USA.gov explains how).
- [ ] Make sure Social Security has been notified of the death (SSA says funeral homes usually report it; otherwise contact SSA).
- [ ] Lock up the home, change locks if needed, and check homeowner's insurance coverage for a vacant home.
- [ ] Keep utilities on that you need for the cleanout; forward or monitor mail.
- [ ] If an estate attorney is involved, ask what must be kept, inventoried, or valued before anything leaves.

Phase 2: Find and save important papers

- [ ] Will, trust documents, and any letters of instruction
- [ ] Deeds, vehicle titles, loan and mortgage papers
- [ ] Bank, brokerage, retirement, and insurance statements
- [ ] Recent tax returns and records (the IRS requires a final individual return for the year of death; see IRS guidance)
- [ ] Bills, lists of online accounts, and subscription records
- [ ] Funeral contracts and receipts (the FTC's Funeral Rule gives you the right to itemized prices)
- [ ] Shred sensitive papers only after the executor and any CPA confirm they're no longer needed. See How to Choose a CPA for Estate and Trust Taxes.

Phase 3: Secure valuables and risky items

- [ ] Jewelry, cash, coins, collectibles, and art
- [ ] Firearms (follow your state's transfer rules)
- [ ] Prescription medications (use a take-back program)
- [ ] Keys, garage remotes, and vehicles
- [ ] Photograph rooms and valuable items before moving anything

Phase 4: Family keepsakes

- [ ] Follow any specific gifts in the will or trust
- [ ] Ask each family member for a written wish list
- [ ] Set a fair method for choosing, and a deadline
- [ ] Record who received what

Phase 5: Value and sell

- [ ] Get an independent appraiser for high-value items. See How to Choose an Estate Appraiser.
- [ ] Decide on an estate sale, consignment, auction, or selling privately. See How Much Does an Estate Sale Company Charge in California?
- [ ] Read the contract for leftover, buyout, and payout terms. See Estate Sale Contract Red Flags.

Phase 6: Donate

- [ ] Choose charities and confirm what they accept
- [ ] Keep itemized receipts; IRS Publication 561 explains how donated property is valued
- [ ] Ask your CPA how donations affect the estate's taxes

Phase 7: Clear out the rest

- [ ] Separate hazardous items (paint, chemicals, batteries) for your local household hazardous waste program
- [ ] Check city bulky item pickup for a few large items
- [ ] Get 2–3 written quotes from estate cleanout companies. See How to Choose an Estate Cleanout Company and Estate Cleanout vs. Junk Removal.
- [ ] Do a final walkthrough: closets, attic, garage, sheds, safes

Phase 8: Wrap up

- [ ] Keep records of sales, donations, and expenses for the executor's accounting
- [ ] Return keys and remotes; cancel utilities and services when done
- [ ] If the home will be sold, talk to a probate realtor

Sources: California Courts Self-Help (selfhelp.courts.ca.gov/probate); USA.gov; SSA; IRS (final returns, Pub. 561); FTC Funeral Rule; CFPB. Estate Services Directory — estateservicesdirectory.org