

THE FIELD GUIDE FOR LISTING AGENTS

THE PROBATE GOLD KIT

Build a steady probate listing stream in 30 days. No cold calls. No creepy letters. No guessing.

INSIDE

County money math | The 5-point filter | 7-day quick start

Attorney scripts | Family letter | Follow-up plan | Pipeline tracker (spreadsheet)

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20+ years working probate · 30-year San Francisco listing agent · Former CPA · Founder, The Listing Collective

A NOTE FROM CHRIS

Most agents run from probate. Good. That's your opening.

I've been listing homes in San Francisco for 30 years, and working probate for more than 20 of them. Before real estate, I was a CPA at Coopers & Lybrand.

\$1.5M

Three weeks after I started working probate, I took my first probate listing. It was **\$1.5 million**. Twenty years later, I'm still working probate — and this is the system I use.

Why does the CPA part matter? Because probate is three things: a house, a pile of paperwork, and an attorney who wants it done right. Most agents are only comfortable with the house.

Here's the truth. Sometimes probate pays fast. Mostly it pays the agents who **don't quit**. Most agents send one letter, hear nothing, and give up. The ones who win keep showing up, calmly, for months.

This kit is the whole system. Work it for 30 days. If you want help fitting it to your market, the last page shows you how.

The 3 rules

1

Help first

Grief is not a sales trigger. Lead with something useful, every time.

2

Attorneys are the pipeline

One good estate attorney can send you cases for years.

3

Months, not days

Every lead gets a next step and a date. No date, no pipeline.

AS SEEN ON

NBC

California Association of REALTORS® stage

Florida REALTORS® stage

Michigan REALTORS® stage

DO THE MATH FIRST

What's sitting in your county right now?

Before you send one letter, see what probate is worth to you. Fill in your numbers in the right-hand blanks. The example column shows how it works.

	STEP	YOURS	EXAMPLE
A	Probate filings per month in your county	_____	40
B	Share that include a house	_____	50% = 20
C	Estate houses per year (B × 12)	_____	240
D	Listings you win (just 2%)	_____	≈ 5
E	Your average sale price	_____	\$800,000
F	Your commission per listing (2.5%)	_____	\$20,000
G	Probate income per year (D × F)	_____	≈ \$100,000

Example numbers only. Get your real filing count from your county court website on Day 1. The tracker spreadsheet does this math for you.

And that's before the attorney sends you estate #2, #3 and #10.

Want me to run these numbers on your county?

[BOOK A FREE CALL →](#)

FIND · FILTER · REACH · REPEAT

The Probate Gold System

01**Find**

County probate court site, probate data services, title reps, estate attorneys, public notices.

02**Filter**

Score every case with the 5-point filter below. Only work the 3s, 4s and 5s.

03**Reach out right**

Attorney first. Family second. Always bring something useful.

04**Repeat**

Every case gets a next step and a date in your tracker. Every week.

The 5-point filter — 1 point each. Work cases that score 3+.

- The estate includes a house in your service area.
- The house looks vacant, dated, or hard to manage.
- The heirs or personal representative live out of the area.
- The value fits your price range (or beats it).
- An attorney is listed on the case.

Check before you reach out

Address · ownership · value range · occupancy · personal representative · attorney · case number · case stage

Bring something useful

A written value range · a list of trusted vendors (clean-out, locksmith, repairs) · a one-page "how the sale works" timeline

Research earns relevance. Relevance earns replies.

TAKE ACTION

Your 7-day quick start

- DAY 1** Pick one county. Find where probate filings are posted. Fill in the money math on page 3.
- DAY 2** Pull 25 recent cases. Score each one with the 5-point filter.
- DAY 3** Research your top 10. Address, value range, condition, who's in charge.
- DAY 4** List every attorney on those cases. Find their phone, email and LinkedIn.
- DAY 5** Contact 5 attorneys with the scripts on page 6. Ask for 15 minutes, not referrals.
- DAY 6** Send 5 family letters (page 7) — only where local rules allow it.
- DAY 7** Put every case in the tracker with a next step and a date. Block next week's follow-up time.

WIN THE WEEK: 25 cases scored · 10 researched · 10 people contacted · every next step dated.

Stuck on Day 1? I'll walk you through your county.

[BOOK A FREE CALL →](#)

TOOL 1

Attorney scripts

PHONE

"Hi [Name], this is [Your Name]. I'm a listing agent in [Market] and I focus on estate property. When an estate has a house, the family usually needs three things fast: a real value, a plan for the condition, and someone who calls back. That's what I do. Could I buy you a coffee for 15 minutes and learn how you like the real estate side handled?"

EMAIL · SUBJECT: The house part of your estates

Hi [Name],

I'm a listing agent in [Market] who focuses on estate property. When one of your cases includes a home, I can give your client a written value range within [48 hours], a list of trusted vendors (clean-out, locksmith, repairs), and a clear sale timeline — with updates sent to you, not just the family.

No cost, no pressure. Open to a 15-minute coffee next week?

[Your Name] | [Phone]

LINKEDIN

"Hi [Name] — I'm a listing agent in [Market] who focuses on estate homes. I'd like to be the person you call when a case has a house in it. Open to connecting?"

VOICEMAIL

"Hi [Name], [Your Name] here. I'm a listing agent in [Market] who focuses on estate property. I'd love 15 minutes to learn how you handle the house side of your cases. [Phone] — again, [Phone]. Thanks."

WHY THESE WORK: You say what you do in one line, you name the attorney's real problem, and you ask for something small. Be the resource. Never beg for referrals.

TOOL 2

The family letter

Dear [Name],

I'm sorry for your loss. I know handling an estate can feel like a second job you never asked for.

My name is [Your Name], and I'm a listing agent in [Market] who works with estate homes. If it would help, I'm happy to put together a free, written value range for the property at [Address], along with a short list of trusted local vendors — clean-out, repairs, locksmith.

There's no obligation and no rush. Whenever you're ready — next week or next year — I'm here.

Warmly,

[Your Name]

[Company] | [Phone] | [Email]

The standards that protect your name

Be human

A filing is a family, not a lead.
Respect a no. Let them set the timeline.

Stay in your lane

You're not their attorney or CPA.
No legal or tax advice.

Know the rules

Check your state's contact rules
and your brokerage's policies
before you send anything.

TOOL 3

The follow-up that wins listings

Probate moves slowly. Your edge is still being there, helpful and organized, after every other agent has disappeared.

DAY 1

First note

DAY 7

One polite check-in

DAY 30Value update or
resource**EVERY 45-60**

Short check-in

MILESTONESCase or property
changes**AFTER THE FIRST NOTE**

"Hi [Name], just making sure my note reached you. There may be nothing to do yet — that's fine. If a house question comes up, I'm one call away."

WHEN THEY'RE NOT READY

"Totally understand. Would it be okay if I checked back in [time frame]? Meanwhile, I'm happy to send a value range or vendor list."

VALUE UPDATE

"I looked at recent sales near [Address] and thought this might help. Want me to put together a short written value range for the estate?"

CLOSING THE LOOP

"I don't want to crowd your inbox. Should I stay in touch, check back later, or close my file for now? Any answer is fine."

Every touch answers one question: "How can I make this easier?"

TOOL 4

The coffee meeting + your scorecard

5 questions for the attorney — listen more than you talk

- What house problems stress your clients out the most?
- When in a case do families usually need real estate help?
- What makes an agent helpful — or a headache — on an estate sale?
- How do you like to get updates?
- What would make you comfortable introducing me to a family?

Your 30-day minimums

25

cases scored

10

qualified (score 3+)

10

first contacts

5

attorney coffees asked

10

follow-up touches

100%

next steps dated

YOUR TRACKER: Use the Probate Pipeline Tracker spreadsheet that came with this kit. It scores each case, flags overdue follow-ups in red, does your county math, and keeps this scorecard for you. Sort by next action date every morning. Review every Friday: what moved, what stalled, what's next?

[Want a coach checking your scorecard?](#)[BOOK A FREE CALL →](#)

YOU HAVE THE KIT. NOW LET'S BUILD THE PIPELINE.

Want me to map your first 30 days?

Book a free Probate Pipeline Call. In 30 minutes we'll:

- ✓ Pull the real probate numbers for your county
- ✓ Pick the first 3 attorneys you should meet
- ✓ Map your first 30 days, day by day

BOOK YOUR PROBATE PIPELINE CALL →

theagentunleashed.com/bookacall

This call is for you if...

You're a working agent. You want listings, not more buyers. You'll actually do the follow-up.

It's not for you if...

You want a magic letter that works in a week. Probate rewards patience. Nothing else.

WHAT AGENTS SAY ABOUT COACHING WITH CHRIS

"\$11.5M listing in 1 week!"

An \$11.5M land listing and a \$1.135M home listing in his first week of prospecting.

TYLER KALLENBACH · CALIFORNIA

"Chris has been such a wonderful coach to me."

The first program that gave her real confidence — not just more training.

CYNTHIA ROSEN · CALIFORNIA

"One of the best decisions I've made for my real estate business."

Sharper marketing, built around her business.

TESSA MERROUANE · FLORIDA