

# **How to Get Probate Listings**

## **Week 2**

# The System

- Gather leads
- Sort out the best leads
- Enter into your CRM
- Mail
- Call
- Repeat 4 times per lead (once per month)

# Gather the Leads

- Get them from an online legal publication
- Get them directly from the courthouse
- Pay for them (I am working on something)

# How To Get Leads For Free without leaving your office

- Probate is a legal process. One of the legal requirements is that all actions must be published to a newspaper in the County of the decedents residence.
- All States have at least one website that collects all of these notices each day and publishes them on their website for the public to access.
- All you have to do is find the website by googleing “your county your state legal notices”
- You will find 2 or 3. Try a search on each to find the one you like the best.
- Search for the term “petition to probate”, if you get nothing search “notice to creditors”, “probate” and finally “estate”
- Once you figure out which search term gives you the best results search for the last 30 days.
- You are looking for the filing for “petition to probate” or “notice to creditors” these two filings signal the start of your marketing/mailing.

# How To Get Leads For Free without leaving your office

- Read the filing to find the decedents name.
- Search your county property tax records to see if they owned property in your area.
- If yes then it's a lead.
- Now find the personal representative/executor/administrators name.
- Some states will list their address.
- If not you will need to take down the case number and look up the case on your probate/circuit courts website to get the contact info you need to mail to the personal representative/executor/administrators name.
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# Gather the Leads

[www.publicnoticeads.com](http://www.publicnoticeads.com)



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The public notice database on this site is not a substitute for the official publication that is required by law. You will still find those notices in your local newspaper.

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## **All Across America, Public Notices are your 'Right To Know'**

A single database of Public Notices -- which you may know as "Legal Ads" -- has been created by newspapers in a number of states.

Legislatures require many kinds of public notices so you stay informed about government, corporate and private activities that touch your world. Now newspapers that publish them have enhanced the legislative intent and made them available in one place, any time you need it.

### ***Delivered to your Email Address***

Word search the database manually at no charge, or subscribe to Public Notice Smart Search and have Notices important to you or your company sent to your email address automatically.

Public Notices from nine states are in the database (search each state separately). Just click a link below to get to that state.

# How to Find Contact Info for the Personal Representative

- If you have the case number, you can get the contact information by looking up the case at the courthouse. Some counties let you access the information online.
- You can try Spokeo or Intelius

# Intelius Premier \$19.95/month


PREMIER

Customer Care (888) 706-2669

Unlimited Searches. Instant Results.

Get Premier for 50% Off


First Month  
~~\$49.95~~  
\$9.95\*



**Search for anyone, anytime, anywhere.**

The Intelius mobile app gives you unlimited access to billions of public records on the go.

[Get Premier for 50% Off!](#)\*



\* Get 50% off your first month! Renews monthly for \$19.95. Tax where applicable. Cancel Anytime.

Satisfy Your Curiosity

Save When You Search

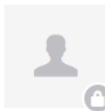
Know Who's Calling

# Spokeo \$4.95/month



✓ Activate Your Account and Unlock Your Report!

🔍 Search Anyone to See Their Address, Phone No. and More!



Latest report as of 04/05/2017

### Results May Include

- ✓ Full Address
- ✓ Birth Month/Year
- ✓ Email Address
- ✓ Phone Number
- ✓ Family Members
- ✓ Location History

### 👍 Your Satisfaction Is Important To Us

If you are dissatisfied with our product, please contact our Customer Care team at 1 (888) 906-0850. We are available 24/7 to assist you.

### 🔒 Your Search History Is Privately Secured

Rest assured your purchase is confidential. No one will EVER be notified about your search.

### 👁️ Security Is Our Top Priority

### Select Your Membership Plan

**Recommended** **BEST DEAL!** **\$4.95/mo**  
6 month Membership \$8.95 /mo

**Moderate Users** **\$7.95/mo**  
3 month Membership \$12.95 /mo

**Casual Users** **\$13.95/mo**  
1 month Membership \$19.95 /mo

### Secure Checkout



EMAIL (THIS WILL BE YOUR LOGIN)

# Sort the Leads

Search your County Property Tax Records to see if the decedent owned real estate in your service area at the time of death.  
Search by the decedents name.

# Enter Leads into CRM

- More efficient to use real estate specific CRM
- A good example is Top Producer
- There are many CRM's available for as little as \$20/ month.
- Get your own. I am not a fan of company provided CRM's.
- Load the letters and calls in sequence. Once you enter a lead, you will be prompted to send letter, make call, etc. Some call this an "action plan".

# Mail Leads

- 4 letters
- 1 letter each month for 4 months
- Follow up each letter with a phone call

# You Must Mail at Least 3 Times

Most agents give up after the first mailing. Investors are generally mailing 3 times.

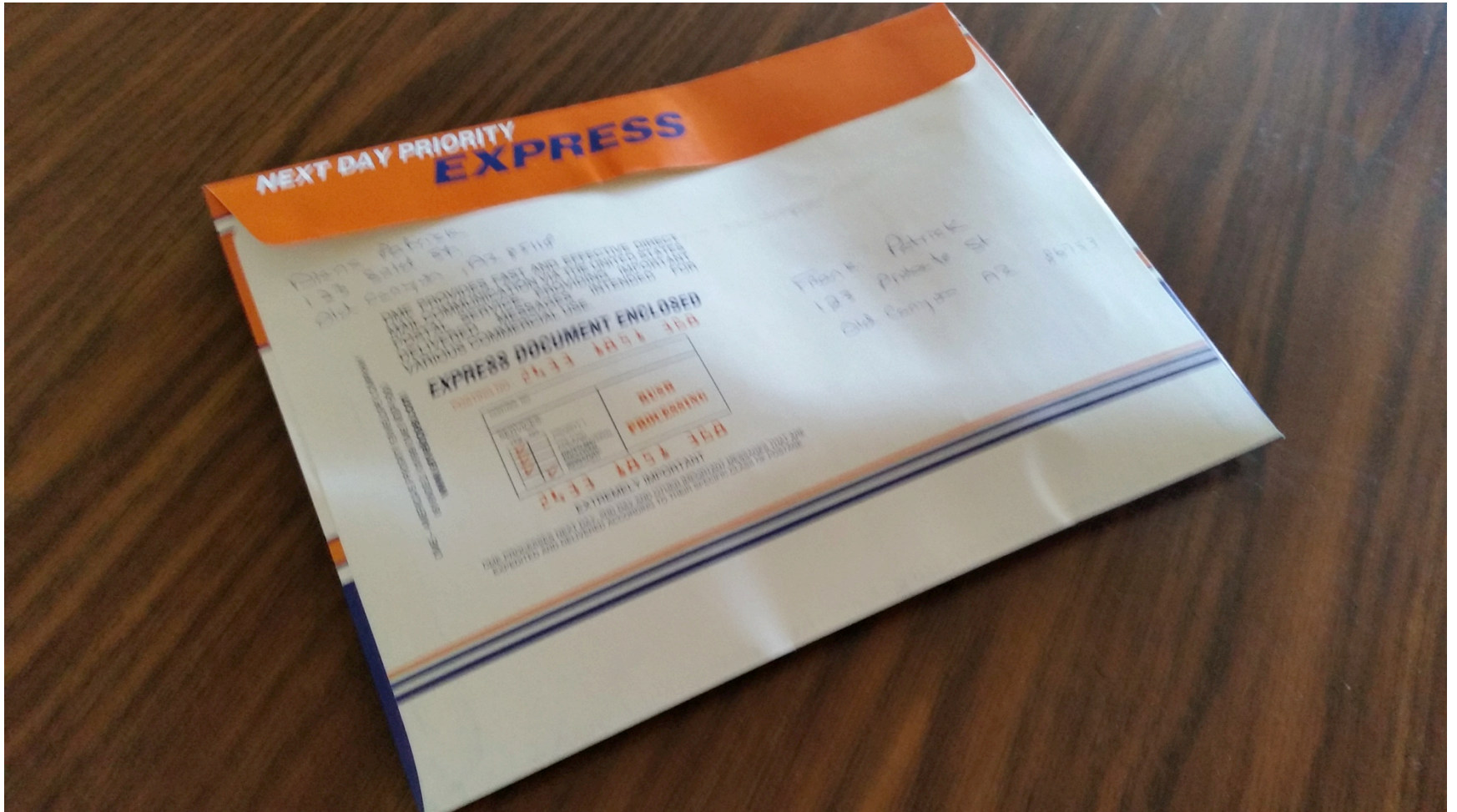
In most cases, it takes 3 months from filing the Petition to Probate until the Personal Representative receives the OK to sell the property.

I am giving you 4 letters. Mail 1 per month, in sequence.

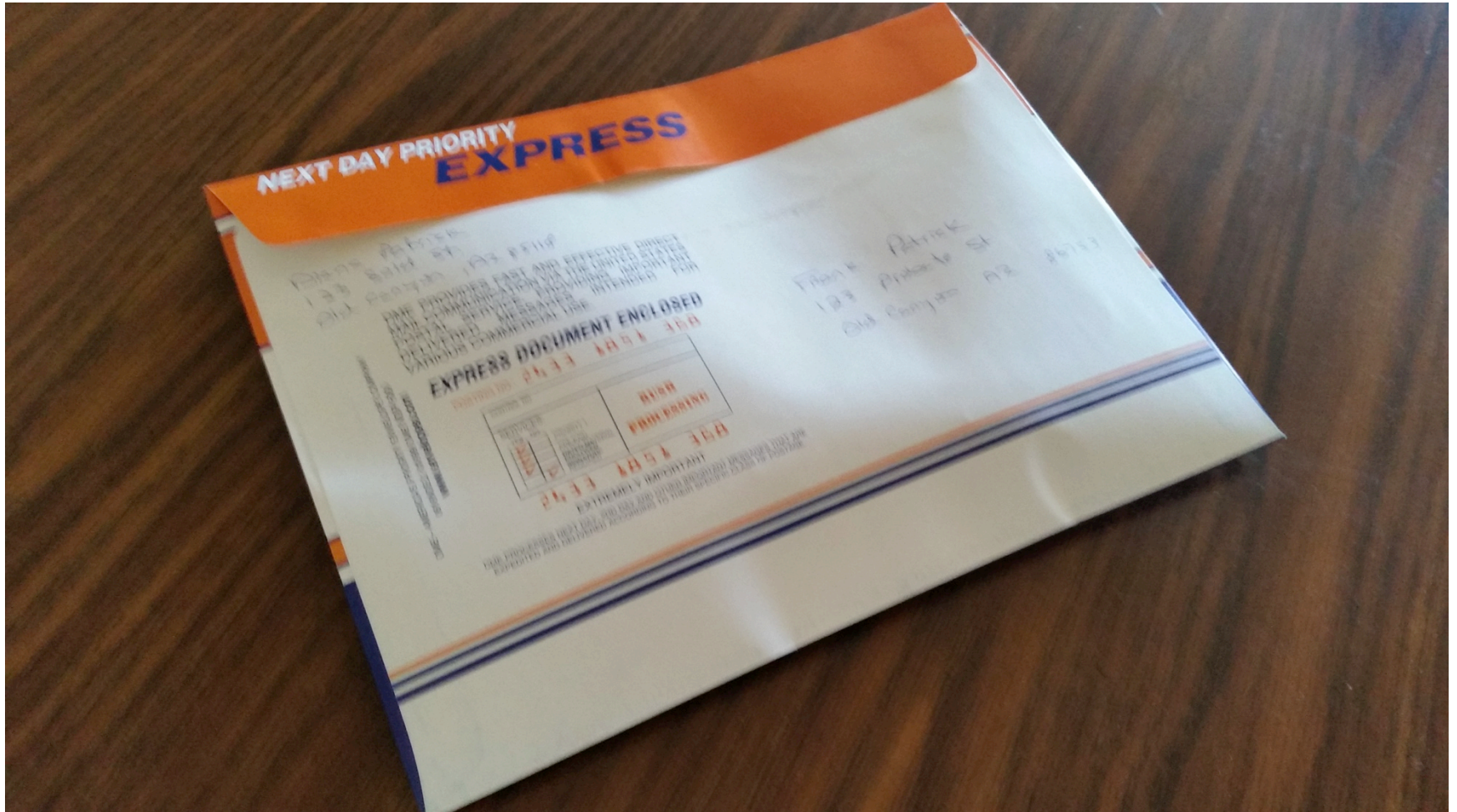
# What You Mail is Important

1. The first letter is an introduction that positions you as a specialist in Probate Real Estate. **Do not ask for the listing.** Offer to be a resource should they have questions. The envelope is addressed by hand. Include a [blue ink pen](#) in the envelope.
2. The second letter informs them that you can refer them to a competent lawn care company, locksmith, handyman, estate sale company, probate attorney, etc. should they need assistance.
3. The third letter informs them you can help them if they want to sell the property quickly, as-is, to an all cash buyer, or you can help them get full market value.
4. The fourth letter offers them a free Broker Price Opinion to help them determine the value of the property. (or a CMA)

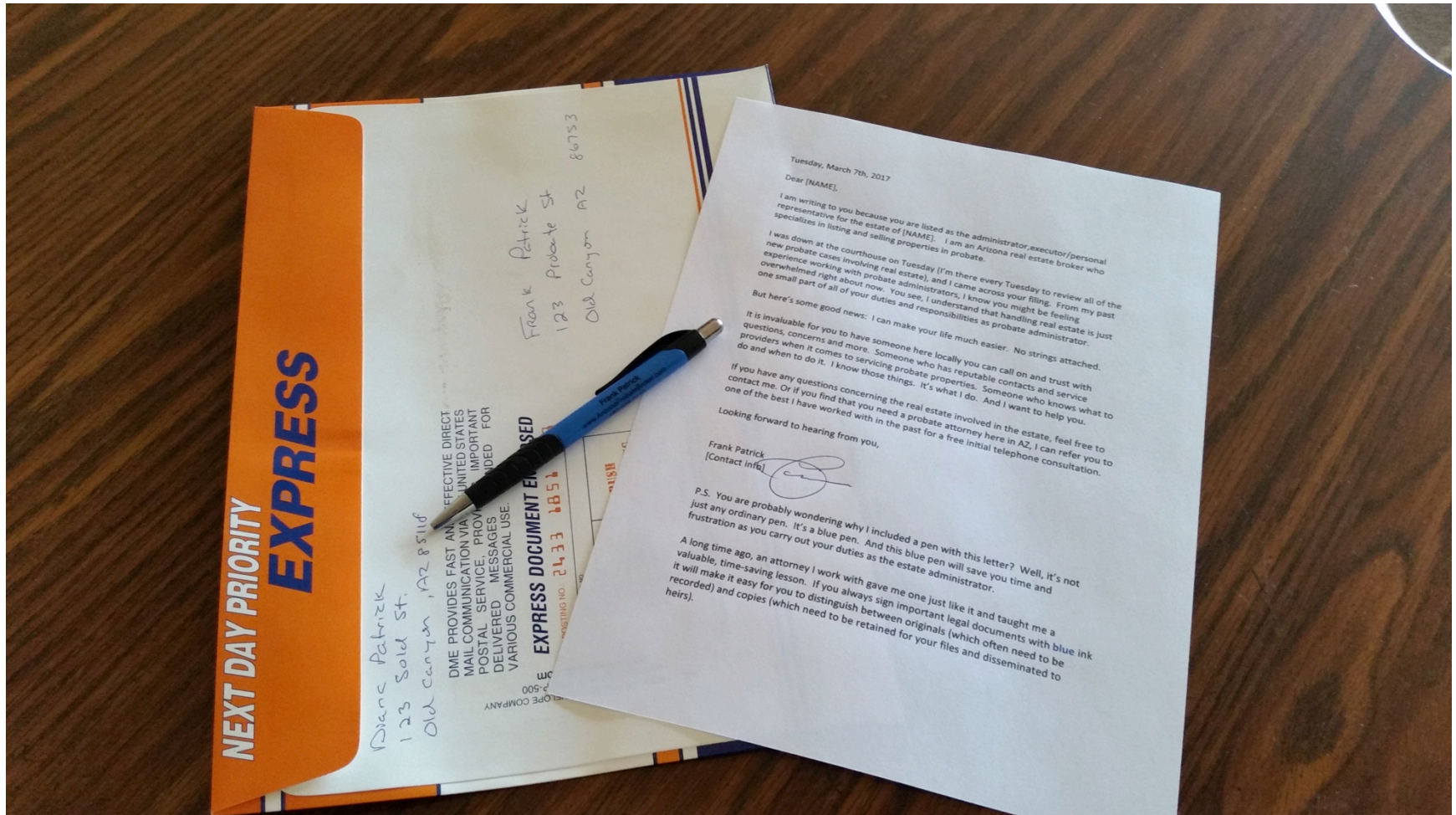
# Mailer #1



# Lumpy Mail is 90% More Likely to be Opened



# What's Inside?



# Details for Letter #1

- Letter 1 is on plain white paper. I print it on a color printer so the word “blue” is printed in blue ink.
- Hand addressed “Express” envelope with First Class postage.  
[www.xpressenvelopes.com/](http://www.xpressenvelopes.com/)
- Include blue ink pen with your name, telephone number and “Probate Specialist”.  
[www.amsterdamprinting.com](http://www.amsterdamprinting.com)

# Theory of Including Pen

- Gets envelope **opened**  
(90% of competing letters will not get opened)
- Gifts create **reciprocity**
- Reason for gift “**blue ink story**” demonstrates how your **specialized knowledge** can help them save time and avoid mistakes. This creates **authority** and makes it easy for the prospect to say yes to you later.

# Letter #1

Dear [Personal Representative],

I am writing to you because you are listed as the personal representative for the estate of [NAME]. I am an Arizona real estate broker who specializes in listing and selling properties in probate.

I was down at the courthouse on Tuesday (I'm there every Tuesday to review all of the new probate cases involving real estate), and I came across your filing. From my past experience working with probate administrators, I know you might be feeling overwhelmed right about now. You see, I understand that handling real estate is just one small part of all of your duties and responsibilities as probate administrator.

But here's some good news: I can make your life much easier. No strings attached.

It is invaluable for you to have someone here locally you can call on and trust with questions, concerns and more. Someone who has reputable contacts and service providers when it comes to servicing probate properties. Someone who knows what to do and when to do it. I know those things. It's what I do. And I want to help you.

If you have any questions concerning the real estate involved in the estate, feel free to contact me. Or if you find that you need a probate attorney here in AZ, I can refer you to one of the best I have worked with in the past for a free initial telephone consultation.

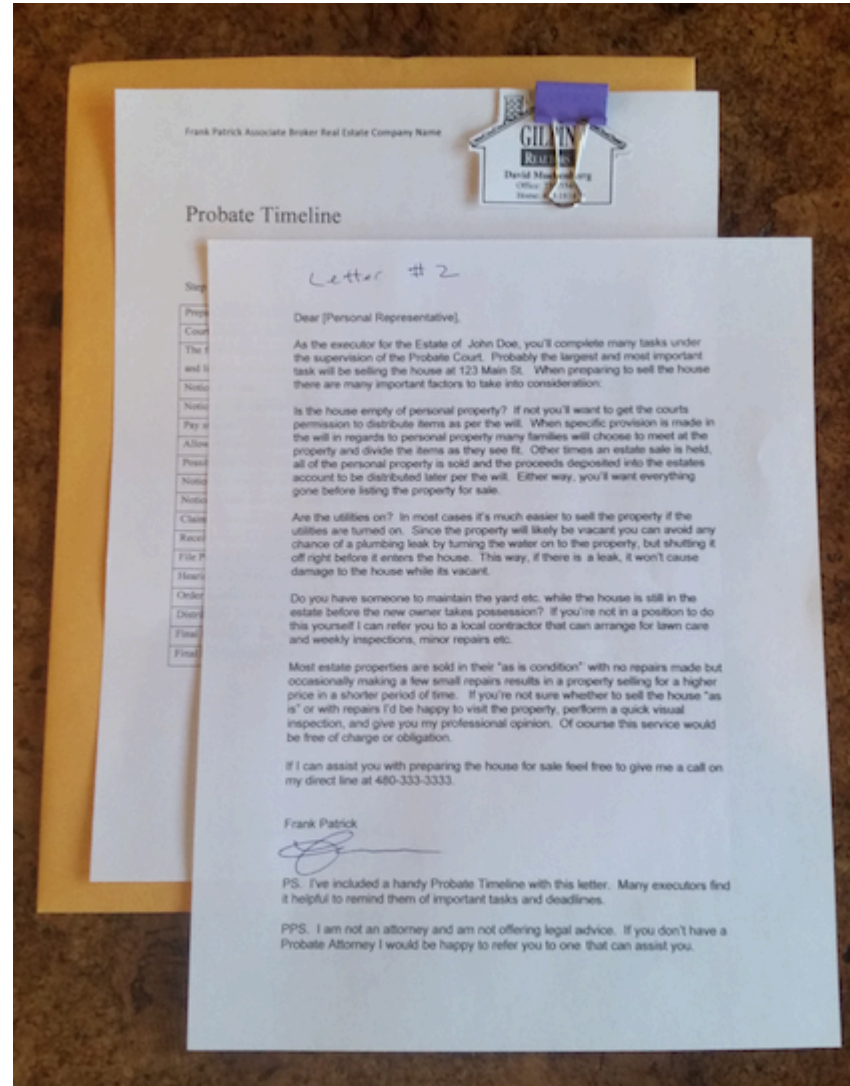
Looking forward to hearing from you,

Frank Patrick

P.S. You are probably wondering why I included a pen with this letter? Well, it's not just any ordinary pen. It's a blue pen. And this blue pen will save you time and frustration as you carry out your duties as the estate administrator.

A long time ago, an attorney I work with gave me one just like it and taught me a valuable, time-saving lesson. If you always sign important legal documents with **blue** ink it will make it easy for you to distinguish between originals (which often need to be recorded) and copies (which need to be retained for your files and disseminated to heirs).

# Letter #2



# Details for Letter #2

- Letter 2 is on very light pastel color paper. I use a very light shade of yellow. (It's hard to see in photo.)
- The letter is folded in half in a hand addressed A9 pastel envelope with First Class postage.  
[www.envelopes.com/](http://www.envelopes.com/) (10¢ - 50¢)
- Include refrigerator magnet clipped to the Probate Timeline with your name, telephone number and "Probate Specialist".  
[www.amsterdamprinting.com](http://www.amsterdamprinting.com)

# Letter #2

Dear [Personal Representative],

As the executor for the Estate of John Doe, you'll complete many tasks under the supervision of the Probate Court. Probably the largest and most important task will be selling the house at 123 Main St. When preparing to sell the house there are many important factors to take into consideration:

Is the house empty of personal property? If not you'll want to get the courts permission to distribute items as per the will. When specific provision is made in the will in regards to personal property many families will choose to meet at the property and divide the items as they see fit. Other times an estate sale is held, all of the personal property is sold and the proceeds deposited into the estates account to be distributed later per the will. Either way, you'll want everything gone before listing the property for sale.

Are the utilities on? In most cases it's much easier to sell the property if the utilities are turned on. Since the property will likely be vacant you can avoid any chance of a plumbing leak by turning the water on to the property, but shutting it off right before it enters the house. This way, if there is a leak, it won't cause damage to the house while its vacant.

Do you have someone to maintain the yard etc. while the house is still in the estate before the new owner takes possession? If you're not in a position to do this yourself I can refer you to a local contractor that can arrange for lawn care and weekly inspections, minor repairs etc.

Most estate properties are sold in their "as is condition" with no repairs made but occasionally making a few small repairs results in a property selling for a higher price in a shorter period of time. If you're not sure whether to sell the house "as is" or with repairs I'd be happy to visit the property, perform a quick visual inspection, and give you my professional opinion. Of course this service would be free of charge or obligation.

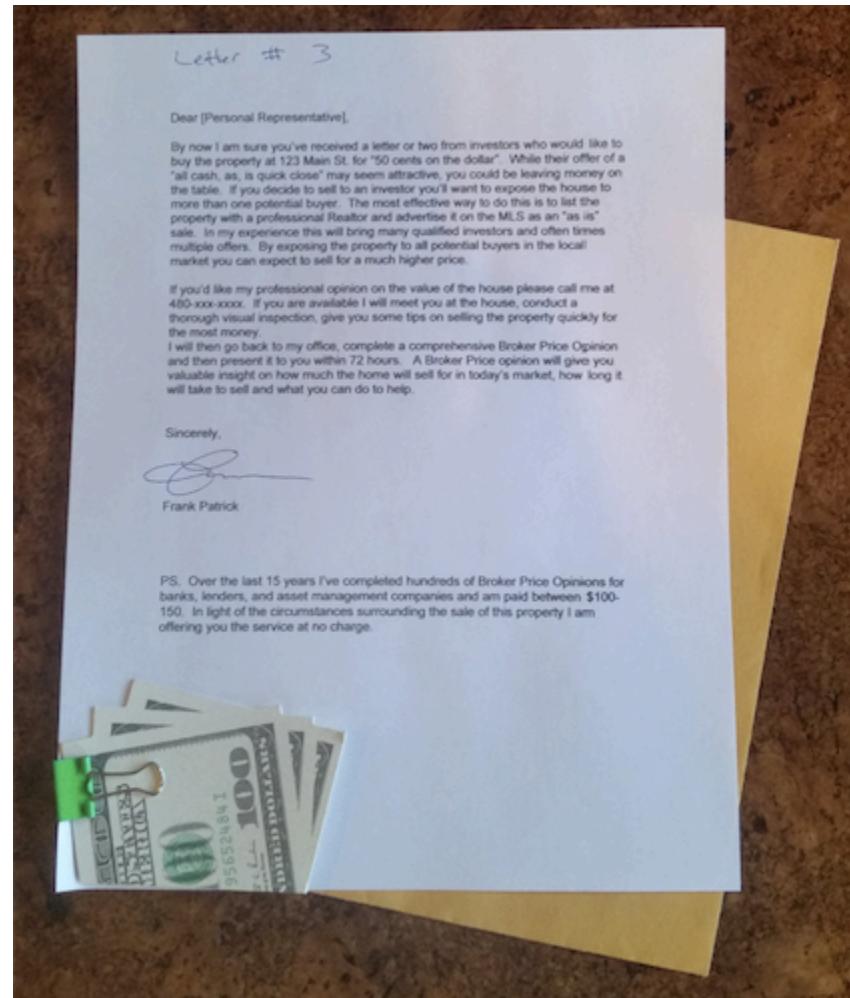
If I can assist you with preparing the house for sale feel free to give me a call on my direct line at 480-333-3333.

Frank Patrick

PS. I've included a handy Probate Timeline with this letter. Many executors find it helpful to remind them of important tasks and deadlines.

PPS. I am not an attorney and am not offering legal advice. If you don't have a Probate Attorney I would be happy to refer you to one that can assist you.

# Letter #3



Letter # 3

Dear [Personal Representative],

By now I am sure you've received a letter or two from investors who would like to buy the property at 123 Main St. for "50 cents on the dollar". While their offer of a "all cash, as, is quick close" may seem attractive, you could be leaving money on the table. If you decide to sell to an investor you'll want to expose the house to more than one potential buyer. The most effective way to do this is to list the property with a professional Realtor and advertise it on the MLS as an "as is" sale. In my experience this will bring many qualified investors and often times multiple offers. By exposing the property to all potential buyers in the local market you can expect to sell for a much higher price.

If you'd like my professional opinion on the value of the house please call me at 480-xxx-xxxx. If you are available I will meet you at the house, conduct a thorough visual inspection, give you some tips on selling the property quickly for the most money.

I will then go back to my office, complete a comprehensive Broker Price Opinion and then present it to you within 72 hours. A Broker Price opinion will give you valuable insight on how much the home will sell for in today's market, how long it will take to sell and what you can do to help.

Sincerely,

Frank Patrick

PS. Over the last 15 years I've completed hundreds of Broker Price Opinions for banks, lenders, and asset management companies and am paid between \$100-150. In light of the circumstances surrounding the sale of this property I am offering you the service at no charge.



# Details for Letter #3

- Letter 3 is on white paper in black ink.
- The letter is folded in half in a hand addressed A9 pastel envelope with First Class postage.  
[www.envelopes.com/](http://www.envelopes.com/) (10¢ - 50¢)
- Include \$100 Drop Card business card clipped to the bottom of the letter.  
[www.dropcards.com](http://www.dropcards.com) (10¢ per card)

# Letter #3

Dear [Personal Representative],

By now I am sure you've received a letter or two from investors who would like to buy the property at 123 Main St. for "50 cents on the dollar". While their offer of a "all cash, as, is quick close" may seem attractive, you could be leaving money on the table. If you decide to sell to an investor you'll want to expose the house to more than one potential buyer. The most effective way to do this is to list the property with a professional Realtor and advertise it on the MLS as an "as is" sale. In my experience this will bring many qualified investors and often times multiple offers. By exposing the property to all potential buyers in the local market you can expect to sell for a much higher price.

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Frank Patrick

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# Letter #4



# Details for Letter #4

- Letter 4 is on white paper.
- The letter is folded in half in a hand addressed 6 x 9 Express envelope with First Class postage.  
[www.xpressenvelopes.com/](http://www.xpressenvelopes.com/) (10¢ - 50 ¢)
- Include refrigerator magnet clipped to the “Executors Duties” with your name, telephone number and “Probate Specialist”.  
[www.amsterdamprinting.com](http://www.amsterdamprinting.com)

# Letter #4

Dear [Personal Representative],

It's been a while since my last letter. I thought I'd follow up to see if you are close to selling the property at 123 Main St.

If you need help preparing the house for sale my team and I can assist you. Over the years we have developed relationships with local service providers that can help you get the house ready to market. If you need a locksmith, estate sale coordinator, lawn care company, painter or handyman we can help you.

If you'd like my professional help determining the value of the house I would be happy to schedule a time to conduct a thorough visual inspection of the property and prepare a written Broker Price Opinion.

A Broker Price opinion will give you valuable insight on how much the home will sell for in today's market, how long it will take to sell and what you can do to help.

If I can assist you in any way feel free to call my Direct Line at 480-333-3333.

Sincerely,

Frank Patrick

# The Call After Each Letter Will Double Your Success

- You will only find telephone numbers for 50% of the leads. If you have the number - **use it!**
- Simply call to see if they received the letter, ask if they have any questions for you, and tell them they can call you anytime.
- Call 3 is to ask if they would prefer to sell quickly, as-is, to an all cash buyer (investor) or list it on the open market to get full market value.
- Call 4 you need to make sure to ask for an appointment to do a CMA or BPO.

# Script

- Hi, this is Frank Patrick, I'm just calling to see if you got my letter about the estate of \_\_\_\_\_.
- I am just calling to introduce myself and see if there is anything I can do to help you. I specialize in assisting personal representatives sell any real estate left in the estate.

# Simple vs. Easy

- You need a decent understanding of the probate process in your state.
- You need a CRM.
- You need to be consistent.
- You need to come from a position of “*service before self interest*”.
- You have to **persevere**.
- 6% of of your leads should turn into listings  
(lowest I have seen is 1%)

# 6% Conversion is Our Goal

- In most cases, no cost for lead
- \$4.50 a mailing x 4 times = \$18 a lead
- \$18 x 100 leads = \$1,800
- 6 out of 100 turn into listings/sales
- Avg. sales price x 3% = \$6,000 in my area
- 6 listings x \$6,000 = \$36,000 return on \$1,800
- Every \$1 you put in returns \$20

# What to Mail After Month 4

- Just solds
- Just listed
- Are you interested in selling the property at:
- Newsletter
- I have buyers looking in your area
- Check MLS to see if property has sold

# The System

- Gather leads
- Sort out the best leads
- Enter into your CRM
- Mail
- Call
- Repeat 4 times per lead (once per month)

**Questions?**

- Join the Facebook group
- Everything we discussed will be emailed to you