



THE TURNKEY ESTATE SOLUTION

WHEN A REAL ESTATE SALE IS REQUIRED
TRUST | PROBATE | CONSERVATORSHIP

HONORING LEGACIES &
PROTECTING FAMILIES



KIM REALTY
GROUP

CASE STUDY

HOW A TURNKEY ESTATE SOLUTION DELIVERED A WINNING RESULT TO A LINGERING ESTATE PROBLEM



BENEFICIARY

PROBLEM

Mother (decedent) passed, had one daughter (lone beneficiary), and the beneficiary's uncle was the personal representative (PR). The daughter was living in the home and did not want to move and sell the home. The uncle determined it was in his niece's best interest to sell home.

SOLUTION

The Kim Realty Group (KRG) with the permission of the beneficiary's attorney, met with the beneficiary to understand her story, as well as what was most important to her. After understanding what she needed, we showed her what was possible in her next home purchase based on affordability and criteria.

RESULT

The beneficiary understood the situation in more detail and was intrigued by the possibility of starting a new chapter in her life. She asked when she needed to move out. The home was sold shortly thereafter.

PERSONAL REP/ TRUSTEE

The uncle did not want to have conflicts with his niece, yet he needed to do what was best for her in the long term. Based on the estate/probate guidelines, it was in the best interest of his niece to sell the home, settle with creditors, and otherwise give her access to the inheritances. The niece didn't agree with her uncle.

Kim Realty Group (KRG) worked closely with the PR's attorney to understand the full scope of the situation. KRG offered to speak to the beneficiary to explain her options if she did decide to sell the home and move. That way no one was pressuring her.

KRG provides a Concierge Real Estate Experience because of the foundation of trust we integrate in every transaction. The PR and attorney trusted the KRG team to get the home ready for sale by using its proven vendors, spending as little money as possible, and securing the highest possible return from the sale for his niece. The home was sold for over \$200K more than what the PR thought the beneficiary could receive! This is a huge success, demonstrating to the beneficiary how much the KRG team cared for her and her mother's wishes.

ATTORNEY

Both the Personal Rep and beneficiary's attorneys were stuck in an estate situation that was lingering for over 1 year. The beneficiary would not move out so the process could not move forward.

KRG problem-solved and used detailed analytics to provide a realistic estimated home evaluation and a net sheet to equate the equity from the sale. They then took the estimated debts from the decedent to calculate the amount the beneficiary would have remaining. The KRG team leveraged that amount to help explain and show the possibilities of what properties the beneficiary could afford to purchase.

After trusting KRG's pricing and marketing strategy, the home received 16 offers, accepted an offer in 5 days, and received more for the home than what the PR, beneficiary, and attorney thought was possible. It was the trusting relationship between the attorneys and KRG that delivered an amazing result for the PR and beneficiary.



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858-391-4663



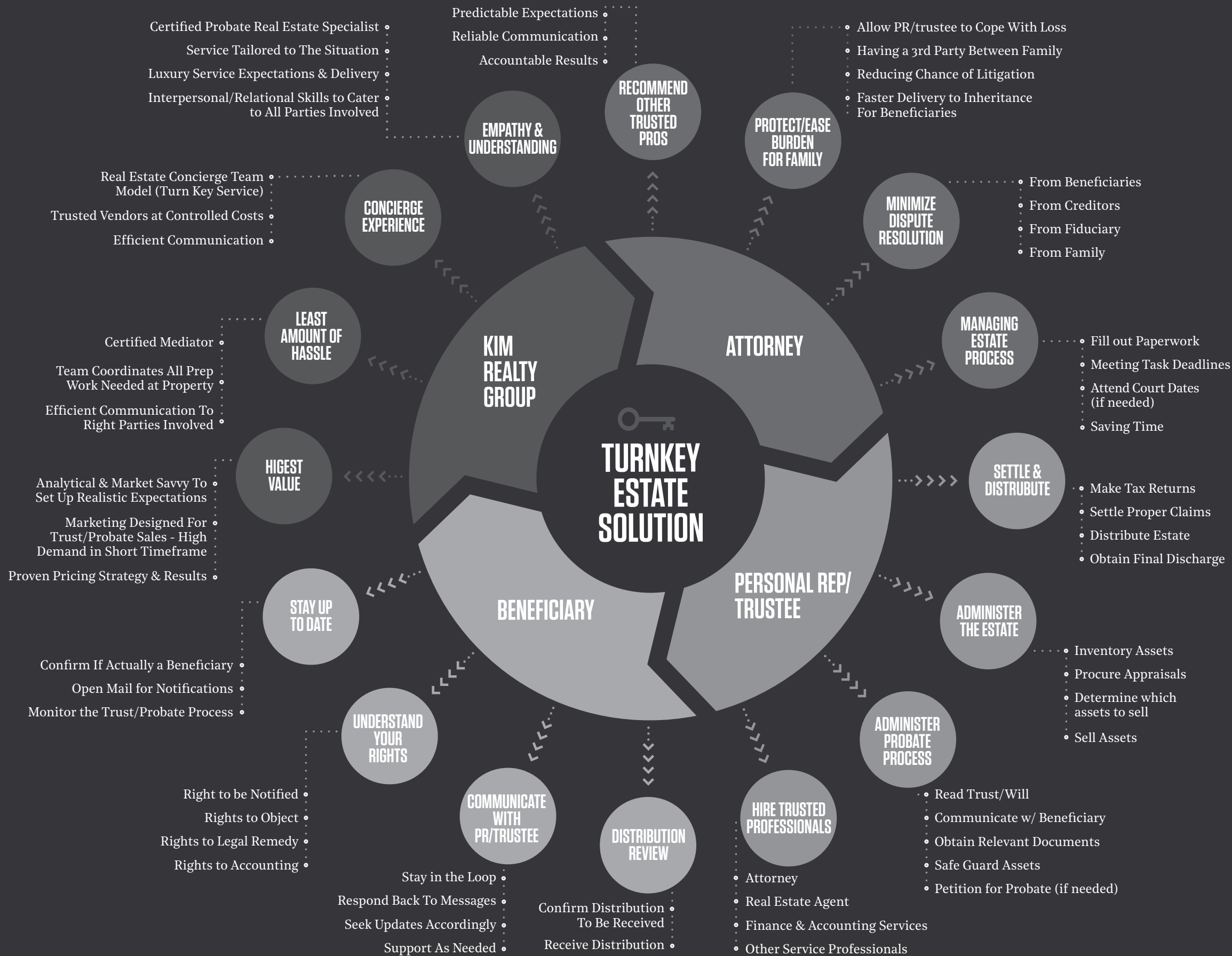
WHAT IS THE TURNKEY ESTATE (TRUST / PROBATE) SOLUTION?

The adjacent diagram is a summary of how our Turnkey Estate Solution directly and indirectly serves parties involved in a Trust, probate, and conservatorship settlements.

Collaboration amongst attorneys, fiduciaries, advisers, real estate agents, and beneficiaries can help limit liability and execute the estate with a successful outcome. As Certified Probate Real Estate Specialists and Mediators, we recognize that teamwork makes the entire estate process as seamless as possible.

Directly Serve: Trustees, Personal Representatives (Executors/Administrators), and Conservators related to the real estate settlement process. Real estate often carries the most value and sentimental attachment, so Kim Realty Group (KRG) will be there to help you navigate your options with support, and industry knowledge, as well as recommending other trusted service providers. We provide this turnkey (concierge) real estate service so you feel secure knowing everything is being taken care of.

Indirectly Serve: Attorneys, fiduciaries, wealth advisors, accounting/tax professionals, and other service providers. By understanding the unique processes and requirements in estate settlements, KRG has developed systems for optimized results. Beyond real estate expertise, we focus on relational equity by helping resolve problematic property situations, mediating issues with difficult family dynamics, and helping the process to work efficiently in a way that increases value.



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It was an estate case that could go sideways in so many ways, starting with the deplorable condition of the home. Luckily, Jeff Kim and his team were retained by the administrator of the estate to do a full scale clean up, and then determine if it was better to invest money to maximize price, or conserve money and sell as-is. We all relied on Jeff's expertise and determined the best course of action was to sell as-is, which proved to be the right call, as the property was quickly sold to an all cash buyer for 22% over asking price, after more than a dozen bids from interested parties. As an estate attorney with over three decades of experience, I have never encountered the level of service the Kim Realty Group provided. I will definitely use their team again in any estate matters that may arise in the future.

-San Diego Estate Planning Attorney

Thomas L.
PROBATE ADMINISTRATOR

Shortly after my father passed away in February, I discovered that he had no Estate planning and that I would have to retain a probate attorney. It was this attorney that recommended Kim Realty Group. After a brief discussion and a walk-through of the house, I knew that Jeff and Jessica were people I could trust. From offer to closing was around 19 days and that was only due to the holiday. Everything Jeff and Jessica said they would do they did. Every time I had a question, they were available. They explained the process and walked me through the paperwork. They were extremely professional and kind every time we spoke. It was one of the easiest transactions I have ever completed in my life. The sale of the home would have happened at some point and it could have been handled by any licensed realtor agent. It's the little things that matter the most. You will be hard-pressed to find a more Honorable, Dependable, and Trustworthy team than Kim Realty Group.

Thomas L.
CLIENT



WHAT IS YOUR STORY? HOW CAN WE HELP?

Every situation and story is unique, so we offer a complimentary 1 hour help session.

Based on understanding your story, we can directly help you.

If not, we will connect you with the right trusted service professional who can best help.

CALL US TODAY: 858-391-4663

OUR STORY

As the team leader and owner of the Kim Realty Group, my background lies in luxury hotel management and process improvement consulting. Because of this, we are able to provide “A Luxury Concierge Experience Tailored to Your Story.” Kim Realty Group’s ethos of providing this high-end service to deliver optimum results using proven systems is why our clients have turned to us across all real estate sectors. We serve based on our client’s unique, individual needs above all else. We have sold over 100+ properties, have 100+ five (5) star reviews, and have not once been unable to sell a client’s property. Your trust in us, and ours in you, is critical. Due to our reliability, our service most resonates with those who not only need the best real estate service, but require it. That is why we focus on Life Event Real Estate Services.

CONTACT US TODAY:
858-391-4663

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JEFF KIM

Owner | REALTOR®

Certified Probate Real Estate Specialist

Certified Mediator

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