

PROBATE TECH COLLECTIVE

The Probate System Map

Seven places a responsible inherited-property practice needs
order

A practical first look at the P.R.O.B.A.T.E. Method™

START HERE

1 A system gives the work somewhere to live

You do not need another disconnected tool. You need a clear way to know what belongs where, what needs your judgment, and what happens next.

Probate Tech Collective helps real estate agents build a human-led, agent-owned system for inherited-property work. This map is a practical first look at the seven jobs that keep the work from living only in your head.

The practical return

More order around the work. More time to prepare. More room to show up as a person when it matters.

1.1 Why the work feels heavier than it should

The filing is in one place. Your notes are somewhere else. A follow-up task is easy to forget. A good professional contact lives in your phone. When the steps do not connect, even careful agents spend more time hunting and second-guessing.

The goal is not to automate a family relationship. The goal is to give the work enough structure that your judgment stays available for the family-facing part.

THE METHOD / IN ORDER

2 The P.R.O.B.A.T.E. Method™

01 Pull (Pull)

Bring locally available probate information into one working place. Know where your county records live, what you can responsibly use, and what still needs verification.

02 Rule Out (Rule Out)

Screen obvious dead ends before spending more time or money. Use simple review rules to decide whether a record deserves your attention.

03 Outreach (Outreach)

Prepare a thoughtful next step when it is appropriate. The system can organize context and drafts, but the agent reviews, decides, and communicates as a person.

04 Builders (Builders)

Keep the property-service bench visible and useful. Know which trusted people may help a family with the work around a property.

05 Allies (Allies)

Build relationships with the professionals who serve the estate. Keep context and respectful next steps out of scattered notes.

06 Track (Track)

Keep the estate, contacts, next action, and follow-up history in one working record. See what is known, what is missing, and what needs review.

07 Evergreen (Evergreen)

Review viable opportunities when circumstances change. A date or automation can surface a record, but it cannot replace judgment.

MAKE IT A HABIT

3 A weekly rhythm keeps the system alive

You do not need to do everything every day. You need a repeatable way to review the work, make a decision, and move one appropriate next step forward.

Focus	Question to ask yourself
Review	What deserves attention this week?
Prepare	What is known, missing, or ready for verification?
Follow through	What human next step is appropriate?
Connect	Which professional relationships need care or context?
Improve	What kept getting stuck, and what should become clearer?

3.1 What to build first

1. **Where does the local information come from?**
2. **Where will the working record live?**
3. **What routine makes sure a good next step does not disappear?**

If you can answer those three questions, the rest of the system has a place to grow. If you cannot, you are not behind. You simply need a clearer starting point.

CHOOSE THE NEXT STEP

4 Two ways to move forward

ONE COUNTY / FEASIBILITY

Probate Engine

Blueprint

A paid, one-county working session to understand the local source, practical constraints, and what a responsible build could require.

Question answered: Can this work in my county, and what should I build?

FOUNDING IMPLEMENTATION

The Probate System

Build

An upcoming six-week implementation experience for accepted founding members who want to build and run the system.

Question answered: Help me build and run it.

One county each.

Probate Tech Collective is looking for up to 25 agents or small teams across the country. Share the county you want to build in. Krista reviews fit and availability. A county is secured only after acceptance and completed enrollment.

REFERENCE

5 Method glossary

Allies – Allies: Build relationships with professionals who serve the estate.

Builders – Builders: Keep the property-service bench visible and useful.

Evergreen – Evergreen: Review viable opportunities when circumstances change.

Outreach – Outreach: Prepare a thoughtful next step when it is appropriate.

Pull – Pull: Bring locally available probate information into one working place.

Rule Out – Rule Out: Screen obvious dead ends before spending more time or money.

Track – Track: Keep the estate, contacts, next action, and follow-up history in one working record.

5.1 Important boundary

This guide provides educational and operational context. It is not legal, tax, privacy, advertising, telemarketing, or professional compliance advice. Requirements vary by state, brokerage, platform, county, and use case. Agents remain responsible for their own professional judgment, broker oversight, and appropriate local review.

Want to see whether your county may be a fit?

Join the founding waitlist for The Probate System Build. The waitlist is the first step, not a county reservation.

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