



Fiduciary Responsibilities



1. Regulation

Topics

2. Changing Marketplace

3. Options & Resources



Rules, Regulation, Guidelines

Real Property

TPP

- Owner/Title
- Transfer
- Appraisal
- Taxes



Tangible Personal Property



Options

Real Property

- Traditional Sale
- Cash Buy
- Auction

TPP

- Estate Sale
- Auction
- Online Auction
- Private Sale
- Consignment
- Clean Out



Estate Sale Benefits



- Commissions
- Insurance
- Pricing
- W-2 Employees
- Background Checks
- Company Address and Phone
- References (call!)
- Legal agreements
- Credit Cards
- Payment Terms
- Status of Unsold Items

Caring Transitions, NAPO,
CPO and CRTS Certifications





- Terms/Fees
- Licensing
- Liability Insurance
- Pricing
- Company Address and Phone
- Ratings
- Legal agreements
- Credit Cards/Seals
- Payment Terms
- Status of Unsold Items
- Shipment options
- Pick up options

State Licensing, NAA, State Associations, Known Online Resources





- Licensed where required
- Payment Terms
- Insurance
- Pricing
- Employees
- Background Checks
- Company Address and Phone
- References (call!)
- Legal documents

Pro Mover, State Moving and Storage Associations, ProtectYourMove.gov (FMCS)



Consignment



Consignment Risks

- Inventory Items
- Terms of Consignment/Pricing
- End of Agreement
- Consistent Communications
- Payment Terms
- Periodic Review
- Insurance
- References (call!)

Value

Real Property

- Certified Appraisal
- Market Value
- Websites

TPP

- Certified Appraisal
- Market Value
- Websites











Value, Volume and Disposition



Your Role







Questions/Comments