01 / START HERE

# The Paralegal’s Appraisal Playbook

A practical desk reference for coordinating real estate valuations in legal matters.

## You handle the case. We’ll handle the valuation.

When a property appraisal lands on your desk, the right information can make the assignment easier to scope, schedule and review. Use this guide to organize the request before contacting an appraiser.

## Inside your playbook

02 | Universal appraisal intake checklist

03 | Probate, inheritance and trust assignments

04 | Family law and commercial property

05 | Effective dates and appraisal terminology

06 | Reusable assignment worksheet

07 | Report delivery, next steps and references

## A note for your legal team

This guide is for administrative coordination and general education, not legal, tax or appraisal advice. Counsel determines legal requirements; the appraiser determines the appropriate appraisal scope and independent opinion of value.

02 / UNIVERSAL INTAKE

# Start with the right details

Use this checklist for every assignment. Missing information can be flagged rather than guessed.

## Assignment essentials

- ☐ Property address and assessor parcel number (APN), if available.
- ☐ Authorized client, intended users and intended use of the report.
- ☐ Effective date of value, confirmed with counsel or the requesting professional.
- ☐ Property interest to be valued; flag partial interests, leases or restrictions.
- ☐ Property type, occupancy, known condition and authorized access contact.
- ☐ Requested delivery date, hearing or filing deadline, and report format.

## Gather only relevant records

- ☐ Deed or title information, floor plans, permits and prior reports, if available.
- ☐ Historical photographs, renovation dates or condition records for past-date assignments.
- ☐ Leases, rent roll and operating information for income-producing property, as applicable.

## Before sending

Confirm a secure transfer method and avoid including unnecessary client identifiers, privileged communications or sensitive case documents. Ask the appraiser which records are needed.

03 / ESTATE MATTERS

# Probate, inheritance & trusts

Confirm the purpose before ordering. An estate inventory, a tax basis question and a trust distribution can require different work.

## Probate coordination

- ☐ Ask counsel whether a court-designated probate referee is required for the Inventory and Appraisal.
- ☐ Confirm whether a separate independent appraisal is needed and for what purpose.
- ☐ Gather parcel details, ownership information, effective date and access authority.

## Inheritance and retrospective assignments

- ☐ Confirm date of death or other instructed valuation date with counsel or tax adviser.
- ☐ Identify changes to property condition, occupancy or improvements since that date.
- ☐ Gather dated photographs, records and relevant transaction history, if available.

## Trust and estate portfolios

- ☐ Create one property list with address, APN, ownership interest and date for each asset.
- ☐ Identify the trustee or authorized representative and any reporting requirements.

## California-specific reminder

A private appraisal is not automatically a substitute for a statutory probate referee appraisal. Counsel should confirm the procedure and any applicable exception. See the California State Controller’s Probate Referees guidance on page 7.

04 / OTHER ASSIGNMENTS

# Family law & commercial

Different property interests and intended uses call for different assignment details.

## Divorce and family law

- ☐ Confirm the property or interests at issue and the valuation date specified by counsel.
- ☐ Identify authorized contacts, access arrangements and any communication restrictions.
- ☐ Share relevant improvements, condition history and prior reports when authorized.
- ☐ Ask whether consultation, deposition or testimony may be needed; confirm scope and fees separately.

## Commercial property

- ☐ Identify use: office, retail, industrial, mixed-use or other property type.
- ☐ Confirm leased or owner-occupied status and interest to be appraised.
- ☐ Gather available leases, rent roll, income and expense records and relevant restrictions.
- ☐ Flag multiple parcels, unusual occupancy or access conditions.

## Neutrality matters

An appraiser’s role is to provide an independent opinion, not to advocate for a party or reach a predetermined number. Do not promise a case outcome, court acceptance or a particular value.

05 / QUICK REFERENCE

# The language of valuation

Six terms worth keeping at your fingertips.

## Effective date

The date to which the opinion of value applies. It is not necessarily the inspection date or the date the report is signed.

## Retrospective appraisal

An assignment with an effective date in the past. Historical records and market evidence help support the analysis.

## Intended use and intended users

The purpose of the appraisal and the parties identified to use it. Confirm both before engagement.

## Property interest

The rights being valued, which may be affected by ownership, leases or other restrictions.

## Price versus value

A transaction price is the amount paid; an appraised value is an opinion developed for a defined assignment. They may coincide or differ.

## Online estimate

An automated estimate may be useful for orientation, but it is not interchangeable with an independent appraisal prepared for the assignment.

06 / PRINT & REUSE

# Assignment worksheet

Complete internally before making an inquiry. Do not include sensitive case information in unsecured messages.

## Property and assignment

Property address / APN: _____

Property type / occupancy: _____

Requested service / intended use: _____

Effective valuation date: _____

Property interest: _____

Authorized client / intended users: _____

Access contact / authority: _____

Requested delivery date: _____

## Records and outstanding questions

Available records: _____

Missing records / restrictions: _____

Questions for counsel or appraiser: _____

## Ready to coordinate?

☐ Confirm scope and fees. [ ] Confirm secure record transfer. [ ] Confirm scheduling.

07 / CLOSE THE LOOP

# From request to report

Keep the assignment organized without prejudging its findings.

## Before engagement

Confirm who can authorize the work, scope, fees, expected timing, access and delivery arrangements. Ask about any additional consultation or testimony needs.

## When the report arrives

Check the property identity, effective date, intended use and agreed deliverable against the engagement. Route technical questions to the appraiser and legal or tax questions to the appropriate adviser. Preserve the report and correspondence in the authorized case file.

## Need help with an assignment?

Visit WCE's Resource Hub for Attorneys, Fiduciaries & Paralegals or westcoast-evaluation.com to discuss the scope of your next valuation.

Don't worry — we've got this.

## Reference sources | reviewed November 25, 2026

California State Controller — Probate Referees (statutory role and guidance).

IRS Publication 559 (inherited property basis; exceptions may apply).

WCE Resource Hub (assignment preparation and valuation services).