

Associate's Name:		Branch:
DOB:	License #:	License Expiration:
Date Licensed:	SSN:	MRIS ID:
Street Address:		
City, State and Zip:		
Home Number:	Cell Number:	Personal Fax:
Personal Email		
Website/Blog:		
Local Association:		NRDS ID:
Secondary Association:		

Emergency Contact Information

Name:	Number:	Relationship:
Street Address:		
City, State and Zip:		

Broker To Complete

CBE Extension:	CBE Fax:	Affiliation Date:
Previous Brokerage:		CREST ID:

Associate's Name: _____

Specialities:

1. _____
2. _____
3. _____
4. _____

Qualifications / Designations:

1. _____
2. _____
3. _____
4. _____

Association - Single Agent Commission Agreement

Level	Agent's Previous Personal Earnings	Commission Split	In-House Buyer Agent Bonus
A	\$0 – 15,999	50%	54%
B	16,000 – 26,799	53%	57%
C	26,800 – 37,499	56%	60%
D	37,500 – 48,199	59%	63%
E	48,200 – 60,999	62%	66%
F	61,000 – 72,799	68%	72%
G	72,800 – 85,699	72%	76%
H	85,700 – 96,399	76%	80%
I	96,400 – 122,099	79%	83%
J	122,100 – 152,099	81%	85%
K	152,100+	85%	90%

- Agents at Commission Level A may increase to level B upon successful completion of "Elite Agent" or "eFastStart" program
- Commissions are distributed after 6% Franchise Fee is deducted from gross
- LeadRouter Referrals are based on 50% split with 25% referral to the company
- RELO and Rental commissions are based on 50% split (some exceptions apply)

Starting Level	
Start Date	
Recruited By	

Associate's Signature: _____ Date: _____

Broker's Signature: _____ Date: _____

New Associate Tracking Form New Associates

Thanks for joining the team at Coldwell Banker Elite! We know that becoming a new agent or transferring from another brokerage is an exciting and often overwhelming experience. Elite offers so many things to our new agents that we've created this list of things to complete to help your new affiliation to go smoothly. The tasks below need to be completed within your first two weeks and returned to the Office Administrator when completed. Staff from various divisions will be in contact with you shortly to help you with marketing, technology, orientation and more. Please be flexible with their schedules.

New Associate: _____

- ___ Complete DPOR, REALTOR® Association and MLS application and notices
- ___ Send your Sphere of Influence (SOI) cards and reminders out by mail and email
- ___ Provide a professional digital photo to the Office Administrator within 2 days of affiliation
- ___ Login to CBWorks.ColdwellBanker.com and take the Lead Router orientation program
- ___ Complete the free eFastStart (new agents) or BOO\$T training in CBWorks
- ___ Register for next CBE Orientation
- ___ Bookmark www.EliteScoop.com and signup by RSS or email
- ___ Configure and bookmark login.microsoftonline.com for company email service
- ___ Complete Coldwell Banker Profile and Website on CBWorks.Coldwellbanker.com
- ___ Setup profile on Realtor.com
- ___ Setup your ZipForms Account (instructions will be emailed to you)
- ___ Setup and bookmark BrokerConnect at <https://cb0207-connect.globalwolfweb.com>

Tasks Assigned by Broker:

1. _____
2. _____
3. _____

	User Name	Password
Phone	Ext:	
MXIE		
BrokerConnect		
eMail		
Zipforms		
DocuSign		
MRIS		
EliteProspector		
ColdwellBankerElite.com		
Realtor.org		
Realtor.com		
CBWorks		
Crest ID		
NRDS Number		

New Associate Tracking Form Office Administrator

The following tasks are to be completed and filed in the Associate's Personnel File. Office Administrator needs to initial next to each task once completed.

New Associate: _____

Primary Branch _____

Date of Affiliation: _____ Date All Tasks Completed: _____

___ Enter into BrokerWolf - CREST ID: _____

___ Assign inner-office mailbox

___ Assign telephone extension and provide to Information Technology Provider

___ Order 5 Name Riders for for-sale signs

___ Order Name Tag

___ Order first 1000 Business Cards

___ Provide Agent with 200 Affiliation Notice mailers

___ Provide New Associate with office orientation

___ Review use of Copier, Fax machine and other office equipment

___ Provide Office Key and Security Code

___ Provide Agent with current Meeting and Education Schedule

___ Add photo and information to CB Profile and CB Website via CBWorks

___ Followup and collect completed Tracking Forms from all parties within 7 business days

New Associate Tracking Form Managing Broker

The following tasks are to be completed and returned to the Office Administrator for filing in the Associate's Personnel File. Please initial next to each task once completed. Tasks can be assigned to Office Administrator at the discretion of the Manager. Please note where assignment is made.

New Associate: _____

Primary Branch _____

- ___ Notify all staff via staff@cbeva.com of new agent, including a bio and photo
- ___ Assign physical desk location at office (if applicable)
- ___ Execute DPOR Agent Transfer or New Agent Form and mail
- ___ Execute Local REALTOR® Association Application and return
- ___ Execute Onboarding packet and provide to Office Administrator
- ___ Introduce Associate to eFastStart on CBWorks University and track completion
- ___ Introduce Associate to LeadRouter Training CBWorks University
- ___ Provide initial contract training and office procedures regarding documents
- ___ Review Company Policy manual and obtain signed written acknowledgment form
- ___ Review Agency Disclosure policies
- ___ Review CBWorks with new Associate
- ___ Review CBE Marketing Guide

Notes: _____

New Associate Tracking Form Marketing Department

The following tasks are to be completed and returned to the Office Administrator for filing in the Associate's Personnel File. Please initial next to each task once completed. Marketing Staff is to make contact with new Associate within two business days of receiving this form and schedule a time within the following week to meet with the new Associate.

New Associate: _____

Primary Branch _____

- ___ Contact new Associate within 2 business days of affiliation
- ___ Add Associate to Company Website within 3 business days of affiliation
- ___ Review Associates current online marketing to ensure compliance with all policies
- ___ Perform Elite Prospector Orientation (if applicable)
- ___ eMail current Marketing Guide to New Associate
- ___ Review Elite Prospector
- ___ Add to Fredericksburg.com
- ___ Add to ColdwellBankerElite.com
- ___ Review Realtor.com

Notes: _____

New Associate Tracking Form Information Technology

The following tasks are to be completed and returned to the Office Administrator for filing in the Associate's Personnel File. Please initial next to each task once completed. IT Staff will make contact with the new Associate within two business days of receiving this form and schedule a time within the following week to meet with the Associate.

New Associate: _____

Primary Branch _____

- ___ Create email account
 - ___ Add to Company Distribution list
 - ___ Create @cbeva.com alternative address
 - ___ Forward to Associate's external email account, if request

___ Assign telephone extension - phone extension: _____

___ Setup DID telephone extension - phone number: _____

___ Setup Zipforms account and add CBE, NAR and VAR libraries

___ Setup MXIE Fax Service - Number: _____

___ Install and configure MXIE on Associates Laptop and desktop (if in office)

___ Install and configure all company printers (provider inservice)

___ Install and configure MXIE phone for Associate's desk

___ Provide orientation for MXIE telephone systems

Notes: _____

New Associate Tracking Form Marketing Department

The following tasks are to be completed and returned to the Office Administrator for filing in the Associate's Personnel File. Please initial next to each task once completed. Marketing Staff is to make contact with new Associate within two business days of receiving this form and schedule a time within the following week to meet with the new Associate.

New Associate: _____

Primary Branch _____

- ___ Contact new Associate within 2 business days of affiliation
- ___ Add Associate to Company Website within 3 business days of affiliation
- ___ Review Associates current online marketing to ensure compliance with all policies
- ___ Perform Elite Prospector Orientation (if applicable)
- ___ eMail current Marketing Guide to New Associate
- ___ Review Elite Prospector
- ___ Add to Fredericksburg.com
- ___ Add to ColdwellBankerElite.com
- ___ Review Realtor.com

Notes: _____

**COLDWELL
BANKER** 

ELITE

Supporting Successful Agents

Name Badge Request

CROWN TROPHY
414 Westwood Office Park
Fredericksburg, VA 22401
(540) 374-8118

Fax (540)374-9890

crowntrophyva@aol.com

Request One Coldwell Banker Elite Name Badge For

Agent Name: _____

Title: _____

Office: _____

Requested by: _____

Date Ordered: _____

Gold Badge

Silver Badge

To Whom It May Concern:

I hereby indemnify Coldwell Banker Elite from all liability in the event any action is taken against the Company in any case where I have failed to abide by any legislative or regulative body, to include but not limited to agency and material fact disclosures.

I understand that the Real Estate Commission can impose fines of \$1,000 per incident where agency has not been disclosed. The Real Estate Commission can review all old files to check for compliance of Virginia Agency Law.

If there is a legal case where the lack of disclosure is an issue, the agent will be responsible for the deductible on our errors and omission insurance.

Furthermore, I agree to maintain a minimum of \$1,000,000 liability coverage on any automobile used for their real estate practice. I agree to maintain a certification of coverage and that the coverage applies to the business use of the automobile.

Signature: _____ Date: _____

Please read and sign this form in the space provided below. Your written authorization is necessary for completion of the affiliation process.

I, hereby authorize Coldwell Banker Elite to investigate my background and qualifications for purposes of evaluating my affiliation with the Firm. I understand that Coldwell Banker Elite will utilize an independent service to assist it in checking such information, and I specifically authorize such an investigation by information services and outside entities of the company's choice. I also understand that I may withhold my permission and that in such a case, no investigation will be done, and my application for affiliation will not be processed further.

Signature of Associate

Date

Associate's Name - Printed

Date of Birth

SSN

DocuSign

DocuSign is a software as a service electronic signature and document workflow automation service that provides electronic signature, document management and verification. It supports signing by mobile device, email and fax.

Coldwell Banker Elite has negotiated a discounted rate for our Associates at _____ per year. The fee is charged to your Associate account and deducted from future commissions.

Yes, I'd like DocuSign:

Signature

Date

Elite Prospector

To be successful in real estate you have to be able to do more than just close the deal. You need to effectively manage and grow a small business. That means finding clients, keeping them, and motivating them to buy or sell.

SharperAgent helps REALTORS® systematically build quality lead pipelines through consistent marketing and client relationship management.

Coldwell Banker Elite has negotiated a discounted rate for our Associates at \$25 per month, but only for those months that you use it. The fee is charged to your Associate account and deducted from future commissions.

Yes, I'd like DocuSign:

Signature

Date



**Real Estate Board
 ACTIVATE/TRANSFER APPLICATION**

**A check or money order payable to the TREASURER OF VIRGINIA, or a completed credit card insert must be mailed with your application package.
 APPLICATION FEES ARE NOT REFUNDABLE.**

**NOT FOR USE BY NEW APPLICANTS. ONLY TO BE COMPLETED IF YOU HAVE
 AN INACTIVE VIRGINIA LICENSE OR IF YOU WANT TO TRANSFER
 YOUR VIRGINIA LICENSE TO ANOTHER VIRGINIA FIRM.**

Select the **one** license action you are requesting.

Action	Fee	X
Activation of <i>individual</i> license	\$60.00	<input type="checkbox"/>
Transfer of <i>individual</i> license	\$60.00	<input type="checkbox"/>

- Legal Name _____
 First Middle Last Generation (SR, JR, III)
- Professional Name (if applicable) _____
 Enter professional name to be used along with the legal name entered in #1.
 (first or last name of your legal name must be included in your professional name)
- Social Security Number - -
- Home Street Address (no PO Box) _____
 City, State, Zip Code _____
- Mailing Address _____
 City, State, Zip Code _____
- Telephone & Facsimile Numbers () - () - () -
 Telephone Facsimile Beeper/Cellular
- Individual's **(10-digit)** Virginia Real Estate License Number _____
- Have you ever been subject to a disciplinary action imposed by any (including Virginia) local, state or national regulatory body?
 No
 Yes If yes, please provide a certified copy of the final order, decree or case decision by a court or regulatory agency with lawful authority to issue such order, decree or case decision.
- 9.A. Have you ever been convicted or found guilty, regardless of the manner of adjudication, in any jurisdiction of the United States of **a misdemeanor involving moral turpitude, sexual offense, drug distribution or physical injury** within the past five years there being no appeal pending therefrom or the time for appeal having elapsed? Any plea of nolo contendere shall be considered a conviction.
 No
 Yes If yes, list the misdemeanor conviction(s). Attach your original criminal history record and any other information you wish to have considered with this application (i.e., information on the status of incarceration, parole or probation; reference letters; documentation of rehabilitation; etc.). If necessary, you may attach a separate sheet of paper.

OFFICE USE ONLY	DATE	FEE	CLASS OF FEE	LICENSE NUMBER	ISSUE DATE
				0 2 2 5	

- 9.B. Have you ever been convicted or found guilty, regardless of the manner of adjudication, in any jurisdiction of the United States of **any felony** there being no appeal pending therefrom or the time for appeal having elapsed? Any plea of nolo contendere shall be considered a conviction.
- No
- Yes If yes, list the felony conviction(s). Attach your original criminal history record and any other information you wish to have considered with this application (i.e., information on the status of incarceration, parole or probation; reference letters; documentation of rehabilitation; etc.). If necessary, you may attach a separate sheet of paper.

See page 3 of this application for information on how to obtain the required police and court records.

10. Have you ever violated the fair housing laws of any jurisdiction?
- No
- Yes If yes, list the violation and attach a certified copy of the final order, decree, case decision or conciliation agreement by a court or regulatory agency with lawful authority to issue such order, decree, decision or agreement.
11. Do you have any other **active** Virginia Real Estate Broker licenses?
- No
- Yes If yes, please complete the following table

Broker License Number	Associate (AB) or Principal (PB)	Firm Name & Trade Name	Firm License Number
	AB <input type="checkbox"/> PB <input type="checkbox"/>		
	AB <input type="checkbox"/> PB <input type="checkbox"/>		

QUESTIONS #12 THROUGH #17 REFER TO THE NEW FIRM OR SOLE PROPRIETORSHIP WITH WHOM YOU WILL BE AFFILIATED. ALL QUESTIONS MUST BE ANSWERED OR THE APPLICATION WILL NOT BE PROCESSED.

12. Firm/Sole Proprietorship Name _____
13. Trade Name _____
14. Firm/Sole Proprietorship Street Address _____
City, State, Zip Code _____
15. Firm/Sole Proprietorship E-mail Address _____
Telephone _____ Facsimile _____
16. Is the real estate firm listed in #12 a **new** business?
- Yes If yes, **and the firm is not a broker-owned sole proprietorship**, the firm must also submit a completed **REAL ESTATE FIRM LICENSE APPLICATION** prior to the Board issuing your broker license. Skip to #18.
- No If no, *and you are applying as the new principal broker*, the firm must also submit a completed **CHANGE OF PRINCIPAL BROKER APPLICATION** prior to the Board issuing your broker license.
17. Firm's (10-digit) Virginia Real Estate License Number 0226- (not required for sole proprietors)

If you are applying as a Sole Proprietor trading under a fictitious name, you must attach a copy of the certificate filed with the Clerk of the Court in the locality where you will be conducting business.

18. What type of license are you requesting? (Select **only** one)
- Salesperson
- Associate Broker
- Principal Broker If checked, skip to #22.
- Sole Proprietorship If checked, skip to #22.
19. Firm/Sole Proprietorship's Principal Broker _____
First Middle Last Generation
20. Principal Broker's (10-digit) Virginia Real Estate License Number 0225-

21. Broker's Statement (must be completed by either the principal or supervising broker with signatory authority who will be responsible for the applicant's real estate activities)

I, _____, _____ authorize _____
Print Name of Principal or Supervising Broker VA (10-digit) Real Estate License No. of Principal or Supervising Broker Applicant's Name

to apply for a license as a real estate salesperson or associate broker with the real estate firm listed in #12, and I hereby assume responsibility for the licensee pursuant to Title 54.1, Chapter 21, of the *Code of Virginia* and the *Real Estate Board Regulations*.

Signature of Broker

APPLICATIONS AND SIGNATURES MUST BE ORIGINAL. FAXES AND COPIES WILL NOT BE ACCEPTED.

By signing this application, you acknowledge that if you are not a Virginia resident, or move outside of Virginia while you hold a Virginia Real Estate License, you understand that this application serves as a written power of attorney, whereby you appoint the Director of the Department of Professional and Occupational Regulation, and his/her successors in office, to be your true and lawful agent and attorney-in-fact, in your stead, upon whom all legal process against and notice to you may be served and who is hereby authorized to enter an appearance in your behalf in any case or proceedings arising out of the trade or profession practiced; and that by submitting this application you hereby agree that any lawful process against you which is duly served on said agent and attorney-in-fact shall be of the same legal force and validity as if served upon you.

22. I, the undersigned, certify that the foregoing statements and answers are true, and I have not suppressed any information that might affect the Board's decision to approve this application. I will notify the Department if I am subject to any disciplinary action or convicted of any felony charges, misdemeanor charges or fair housing violations (in any jurisdiction) prior to receiving the requested license. I also certify that I understand, and have complied with, all the laws of Virginia related to real estate licensure under the provisions of Title 54.1, Chapter 21 of the *Code of Virginia* and the *Virginia Real Estate Board Regulations*.

Signature _____

Date _____

APPLICATIONS AND SIGNATURES MUST BE ORIGINAL. FAXES AND COPIES WILL NOT BE ACCEPTED.

State law requires every applicant for a license, certificate, registration or other authorization to engage in a business, trade, profession or occupation issued by the Commonwealth to provide a social security number or a control number issued by the Virginia Department of Motor Vehicles.

Instructions on Obtaining Court and Criminal History Records

Certified copies of court records may be obtained by writing to the Clerk of the Court in the jurisdiction in which you were convicted. The address is available from your local police department.

Original criminal history records may be obtained by contacting the state police in the jurisdiction in which you were convicted. Virginia residents must complete a criminal history record request form in the presence of a notary public and mail it to the Department of State Police, Central Criminal Records Exchange, Post Office Box 27472, Midlothian, Virginia 23261-7472.

Applicants with criminal convictions and/or license disciplinary actions will be considered by the Real Estate Board, which requires an additional two to three months of processing and review time.

Education Requirements

If you are a salesperson who has renewed your license at least once before, a total of 16 hours of continuing education is required to activate your license. You must complete at least 2 hours in Fair Housing, 3 hours in Ethics & Standards of Conduct, 1 hour in Real Estate Agency, 1 hour in Real Estate Contracts, and 1 hour in Legal Updates. The remaining 8 hours may be in Real Estate Related Subjects or in the specific continuing education subjects mentioned earlier in this paragraph.

*Note – New salespersons must complete 30 hours of post license education to renew their license for the first time. Post license education and continuing education are completely different types of Board-approved education. Post license education cannot be used to activate your license.

If you are a broker, a total of 24 hours of continuing education is required to activate your license. You must complete at least 2 hours in Fair Housing, 3 hours in Ethics & Standards of Conduct, 1 hour in Real Estate Agency, 1 hour in Real Estate Contracts, 1 hour in Legal Updates and 8 hours in Broker Management. The remaining 8 hours may be in Real Estate Related Subjects or in the specific continuing education subjects mentioned earlier in this paragraph.

If your license is inactive for more than three (3) years, you must have at one time completed the current pre-license education requirements for salesperson (60 hours of "Principles of Real Estate Course") and brokers (180 hours of specific courses) to activate your license. Proof of education must be submitted with this application.



COMMONWEALTH OF VIRGINIA

Department of Professional and Occupational Regulation, P.O. Box 29570, Richmond, VA 23242-0570

This card is to be used for **CREDIT CARD PAYMENTS ONLY**. Complete and submit with your renewal card or application. For renewals, please include license number. Incomplete forms may be returned for completion and delay license processing.

Credit Card Number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

 We accept VISA, MasterCard or Discover.

Payment Amount: \$ _____ Card Expiration Date: _____ / _____
Month Year

Cardholder Name (Print): _____
Cardholder's Address: _____
Occupation License Number

--	--	--	--	--	--	--	--	--	--	--	--	--	--

Cardholder's Signature: _____
Optional Daytime Phone number _____ - _____



Fredericksburg Area Association of REALTORS®

2050 Gordon W. Shelton Blvd.
Fredericksburg, VA 22401
Phone: (540) 373-7711
Fax: (540) 736-0301
Web: www.faarmembers.com

AGENT TRANSFER NOTICE

TO: Fredericksburg Area Association of REALTORS®

FROM: _____

BROKER NAME - PLEASE PRINT

This is to certify that _____
AGENT NAME - PLEASE PRINT

is now affiliated with this firm effective ____/____/____.

DATE

BROKER SIGNATURE

COMPANY NAME & LOCATION

This form, along with a \$50 fee, must be sent to the FAAR office on all agent transfers.

Agents New Email Address: _____

Form of Payment: Cash Check Credit Card

Credit Card #: _____ Exp. Date: _____

Authorized Signature: _____



REALTOR® - Is a registered trademark which identifies a professional in real estate who subscribes to a strict Code of Ethics as a member of the NATIONAL ASSOCIATION OF REALTORS.



**VIRGINIA ASSOCIATION OF REALTORS®
INDEPENDENT CONTRACTOR AGREEMENT
BETWEEN REAL ESTATE BROKER AND SALESPERSON**



This AGREEMENT made as of _____, _____ between _____
(herein called "Broker") and _____ (herein called "Salesperson"),
provides:

- (a) Broker is a corporation, partnership, or individual duly licensed in an active status by the Virginia Real Estate Board as a real estate broker;
- (b) Salesperson is an individual or Business Entity Salesperson duly licensed in an active status by the Virginia Real Estate Board as a real estate broker or as a real estate salesperson;
- (c) Broker is qualified to and does operate a general real estate business and does obtain the listings of real estate for sale and lease, and Broker maintains an office properly staffed and equipped to operate such business.
- (d) Salesperson is qualified to conduct the business of a real estate salesperson; and
- (e) Broker and Salesperson wish to become affiliated with each other in such general real estate business of Broker.

Now, therefore, in consideration of the premises and mutual promises herein contained, Broker and Salesperson agree as follows:

1. Licensees: Broker and Salesperson at their separate expense shall keep their licenses issued by the Virginia Real Estate Board in active status, and both at their separate expense shall pay all fees, including license fees and taxes owed to any federal, state, or local governmental jurisdiction and arising out of their respective activities as real estate broker and as real estate salespersons, and neither shall be liable for such fees or taxes owed by the other in the event that the license issued to Broker or Salesperson by the Virginia Real Estate Board is revoked, suspended, or not renewed for any reason, this agreement shall automatically terminate.
2. Listings: Broker agrees to make available to Salesperson all current listings of Broker's office except such listings as Broker for valid and usual business reasons may make available exclusively to some other salesperson or salespersons. Broker also agrees, upon request, to assist Salesperson in his or her work by advice, instruction, and all practicable cooperation.
3. Office Facilities: Broker and Salesperson agree that Salesperson may share with other salespersons affiliated with Broker all of the facilities of the office now operated by Broker in connection with such general real estate business of Broker.
4. Services of Salesperson: Salesperson agrees to work diligently in the sale and lease of any and all real estate listed with Broker and made available to Salesperson, to solicit additional listings and customers in the name of Broker, and otherwise to promote the business of serving the public in real estate transactions to the end that Broker and Salesperson may derive the greatest advantage possible consistent with their professional obligations.
5. Compliance-Dues: Broker and Salesperson agree to comply with all laws, regulations, and codes of ethics that are applicable to Broker and Salesperson, including all laws and rules relating to the making of unsolicited phone calls under the Do-Not-Call rules, Do-Not-Fax rules and rules governing the sending of unsolicited e-mails promulgated by the Federal Trade Commission, Federal Communications Commission or any other governmental entity. Salesperson has been given a copy of all of Broker's company policies, and agrees to be bound by and comply with such policies as they may be amended from time to time. All dues or other expenses of Salesperson arising out of

the membership of Salesperson in any organization, including organizations of brokers, salespersons or both shall be paid by Salesperson, and Broker shall not reimburse Salesperson for such payment.

6. Fees: The fees to be charged for any services performed under this agreement shall be determined by Broker, and Broker shall advise Salesperson of any special contract relating to any particular transaction which Salesperson undertakes to handle. When Salesperson shall perform any service hereunder whereby a fee is earned, such fee shall, when collected, be divided between Broker and Salesperson as described in the attached "Fee Schedule". In the event of special arrangements with any client of Broker or Salesperson on property listed with Broker or controlled by Salesperson, a special division of fee may apply, and such division shall be mutually agreed upon in advance by Broker and Salesperson. In the event that two or more salespersons participate in a particular transaction, the amount of the fee over that accruing to Broker shall be divided between the participating salespersons according to agreement between them. In no case shall Broker be personally liable to Salesperson for any fee, nor shall Salesperson be personally liable to Broker for any fee, but when the fee shall have been collected from the party or parties for whom real estate services are performed, Broker shall pay to Salesperson his or her proportionate share as soon as practicable.
7. Independent Contractor Status: Broker or Salesperson agree that, other than the proportionate share of Salesperson fees earned hereunder on real estate transactions, no compensation shall be payable to Broker to Salesperson by Broker to Salesperson under this agreement or otherwise. Broker and Salesperson also agree that salesperson shall be affiliated with and treated by Broker as an independent contractor for Federal and State income and employment tax purposes and shall not be affiliated with and treated by Broker as an employee for Federal and State income and employment tax purposes, and Broker and Salesperson shall each file such Federal and State tax returns as may be required of each of them to report the income earned by Salesperson as an independent contractor.
8. Expense: Expenses for legal fees and costs, recordation fees or taxes, surveys, and repairs which for some necessity must be payable from fees earned, and also expenses incurred in attempts to collect fees, shall be divided between and paid by Broker and Salesperson in the same proportions as fees are divided between them. Salesperson shall not incur any such expenses without the prior approval of Broker. Any suits for fees shall be maintained in the name of Broker.
9. Indemnification: Salesperson shall indemnify and hold Broker harmless in the event that Broker is required to respond in damages to a third party or parties by reason of any conduct of Salesperson which shall be in violation of any laws, rules, regulations, or codes of ethics applicable to Salesperson. Salesperson agrees to reimburse Broker for any fines or penalties incurred by Broker as a result of Salesperson's failure to comply with all applicable laws, rules, or regulations applicable to Salesperson.
10. Noncompetition: Salesperson shall not, after termination of this agreement, use to his or her advantage, or to the advantage of any competitor of Broker, any information obtained by Salesperson during his or her affiliation with Broker and which is not known generally, and all listings of Broker's office of real estate for sale and lease during such affiliation shall be the property of Broker.
11. Resolution of Disputes: Salesperson agrees that any dispute or disagreement, arising out of his or her activities as a real estate salesperson and between salesperson and another salesperson associated with Broker, which salesperson and such other salesperson cannot resolve, shall be submitted to Broker for decision, and salesperson agrees to accept and comply promptly with the decision of Broker. This provision shall be applicable only if such other salesperson affiliated with Broker is also required by a similar provision in his or her agreement with Broker to submit such disputes or disagreements to Broker for decision.
12. Termination: This agreement and the affiliation of Broker and Salesperson may be terminated at any time by either party upon notice in writing to the other party, but such termination shall not affect the respective right of the parties to their division of commissions earned before such notice of termination on both listings and transactions under contract, unless otherwise agreed between the parties.
13. Miscellaneous: This agreement shall be governed by the laws of Virginia in all matters, including, without limitation, its validity, construction, interpretation, and performance, and neither it nor any of its provisions may be

modified, waived, or discharged except by written instrument signed by the party against which enforcement of the modification, waiver, or discharge is sought, and shall supercede all previous agreements between the parties.

WITNESS the following signatures and seals:

_____ (SEAL)
Broker

_____ (SEAL)
Salesperson

COPYRIGHT© 2004 by the Virginia Association of REALTORS®. All rights reserved. This form may be used only by members in good standing with the Virginia Association of REALTORS®. The reproduction of this form, in whole or in part, or the use of the name "Virginia Association of REALTORS®, in connection with any other form, is prohibited without prior consent from the Virginia Association of REALTORS®.

“A” TEAM AGENT

This Agreement is entered into as of this _____ day of _____, 20____, between _____, a duly licensed real estate broker (“Broker”) and _____ (“Associate”).

WHEREAS, Broker and Associate are parties to an Independent Contractor Agreement or similar agreement (the “Agent Agreement”) whereby Broker and Associate have entered into an independent contractor relationship;

WHEREAS, Broker supplies and performs real estate services as a member of the Cartus Corporation (“Cartus”) Broker Network;

WHEREAS, Associate desires to be eligible for referral of buyers and sellers through the Corporate and Government program of the Affinity Services division of Cartus and has been designated as an “A” Team agent for such program;

WHEREAS, as an “A” Team agent for such program, Associate may enter the homes of Corporate and Government members;

WHEREAS, in order to remain such an eligible “A” Team Associate, Cartus requires certain assurances concerning Associate’s background.

NOW THEREFORE, in consideration of the premises and the mutual covenants and obligations contained in this amendment, as well as other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties make and enter into this Agreement.

1. The Agent Agreement is hereby amended to add the following paragraphs:

A. Background Check. Associate hereby (I) agrees that investigative background inquiries are to be made on myself including criminal, OFAC and other reports. This information will, in whole or in part, be obtained from a third party vendor. These reports will include information as to felony and/or certain misdemeanor convictions and the presence of my name on OFAC lists. Further, Associate understands that information will be requested from various federal, state and other agencies which maintain public and non-public records concerning my past activities relating to such matters; (II) agrees that the results of such background checks may be disclosed to Broker, Cartus, and their respective representatives and auditors; (III) acknowledges that Cartus may, in its sole discretion, determine that the results of such background checks will result in the termination of my status as an “A” Team Associate; (IV) agrees to co-operate with the background vendor chosen by Cartus from time to time, Broker, Cartus and provide any documentation deemed necessary by any of them in connection with such background checks and (V) acknowledges that Broker will attempt to obtain information from sources deemed reliable but does not guarantee the accuracy or completeness of the information provided, and in no event shall Broker or Cartus be held liable in any manner whatsoever for any loss or injury to Associate resulting from the obtaining or furnishing of such information (including incomplete or erroneous information), and further that Associate agrees to hold Broker and Cartus harmless and indemnify it from any and all claims, losses, and damages arising out of alleged liability or failure of them with respect to such information

and their actions in connection with such background checks, including, without limitation, any failure to take any action mandated by the Fair Credit Reporting Act and any applicable state employment laws.

B. Associate Warranty. Associate warrants that all Associate's name and social security numbers match and that he/she is (check applicable line):

_____ a United States citizen; or

_____ I have attached hereto one of the documents currently accepted by the U.S. Citizenship and Immigration Services "USCIS" and its predecessors as proof of employment eligibility (whether or not such Provider is an employee of Broker), as shown on USCIS website's instructions for Form I-9 (www.uscis.gov/graphics/formsfee).

Except as amended herein, the Agent Agreement remains in full force and effect in accordance with its terms.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year first above written.

ASSOCIATE:

BROKER:

BY: _____

BY: _____

Name:
Title:
Its Authorized Signatory

Name:
Title:
Its Authorized Signatory

I. I understand that an investigative report may be generated on me that may include information as to my character, general reputation, personal characteristics, or mode of living; work habits, performance or experience, along with reasons for termination of past employment/professional license or credentials; or criminal/civil/driving record history. I understand that SecurTest, Inc. and/its agents or affiliates, on behalf of my prospective or current employer, may be requesting information from public and private sources about any of the information noted earlier in this paragraph in connection with the employer's consideration of me for employment, continued employment, promotion, position, or re-assignment, now or at any time during my tenure with the employer, and I give my full consent for this information to be obtained. **We do not check consumer credit reports.**

II. IF APPLICABLE, Medical and worker's compensation information will only be requested in compliance with the Federal Americans with Disabilities Act (ADA) and/or any other applicable state laws. According to the **Fair Credit Reporting Act** (FCRA, Public Law 91-508, Title VI), I am entitled to know if the considerations for which I am applying are denied because of information obtained from a consumer reporting agency. If so, I will be notified and be given the name of the agency providing that report.

III. I acknowledge that a telephonic facsimile (FAX) or photographic copy of this release shall be as valid as the original. This release is valid for most federal, state and county agencies. I have received a copy of my Fair Credit Reporting Act (FCRA) rights found on pages 3, 4 and 5.

IV. I hereby authorize, without reservation, any financial institution, law enforcement agency, information service bureau, school, employer or insurance company contacted by Eid Passport Inc. and SecurTest, Inc. or its affiliates or agents to furnish the information described in Section I.

v. I understand that if I am a resident of **California, Minnesota/Oklahoma (only)** I may obtain a copy of the report ordered, and now indicate my desire to do so by checking this box

Client Code: _____

CANDIDATE COMPLETE THE FOLLOWING: [INFORMATION MUST BE NEATLY PRINTED OR TYPED]
ALL BOXES MARKED ★ MUST BE COMPLETED

<input type="text"/>	<input type="text"/> Today's Date (if blank then date submitted)
Please print first name ★	Please print last name ★
<input type="text"/>	<input type="text"/>
Please print middle name	Please print maiden name (if any)
<input type="text"/>	<input type="text"/>
Mother's Maiden Name if lived outside Continental USA	Any other Names Used, such as Maiden Name

The following information is required by law enforcement agencies and other entities for positive identification purposes when checking public records. It is confidential and will not be used for any other purposes.

<input type="text"/> ★	<input type="text"/> - - ★
Month, Day and Year of Birth mm/dd/yyyy	Social Security Number (REQUIRED) xxx-xx-xxxx
<input type="text"/> ★	<input type="text"/> ★
Home Address (Do not use a Post Office Box)	City State Zip
<input type="text"/>	<input type="text"/> ★
Driver's License Number and State or Government ID	Telephone Number, including Area Code (PREFERABLY CELL #)

Email Address AND Text Message to help expedite your receiving a copy of any report with or without adverse information in accordance with the Fair Credit Reporting Act at www.ireviewnow.com:

★ **Important** YOUR EMAIL or Cellular Phone Number
Obtain a free email at gmail.com or yahoo.com, among others

FAIR CREDIT REPORTING ACT NOTICE:

In accordance with the Fair Credit Reporting Act (FCRA, Public Law 91-508, Title VI), this information may only be used to verify a statement(s) made by an individual in connection with legitimate business needs. The depth of information available varies from state to state. Status of updates is available on request. Although every effort has been made to assure accuracy, SecurTest, Inc., its affiliates or sources of information cannot act as guarantor of information accuracy or completeness. Final verification of an individual's identity and proper use of report contents are the employer (user's) responsibility. SecurTest, Inc.'s policy requires purchasers of these reports to have signed a Service Agreement. This assures SecurTest, Inc., its agents or affiliates that users are familiar with and will abide by their obligations, as stated in the FCRA, to the individuals named in these reports. **If information contained in this report is responsible for the suspension or termination of an employee or the application process the candidate/employee must receive a copy of the SecurTest report and SecurHomeland to verify and authenticate the information. I certify that I have received a copy of my FCRA Rights found on pages 4 to 6. The employer/user of the report has agreed to give you a copy of your report and iReviewNow.com. You can instantly review your report for FREE, identify errors or mistakes, report identity theft, dispute inaccuracies, provide comments at iReviewNow.com. (See page 3 for details).**

(SIGNATURE) ★

**NOTICE TO CALIFORNIA CANDIDATES
(ALL CONSUMERS RECEIVE A COPY OF THEIR REPORT)**

You have a right to obtain a copy of any consumer report or investigative consumer report obtained by checking the box provided below. The report will be mailed or emailed to you within three (3) business days after we receive the requested reports related to the matter investigated. Under section 1786.22 of the California Civil Code, you may view the file maintained on you by SecurTest, Inc. during normal business hours. You may also obtain a copy of this file directly from SecurTest, Inc. by calling them, appearing in person, making a request by mail, fax or online. SecurTest has personnel available to explain your file to you and will explain any coded information appearing in your file. If you appear in person, a person of your choice may accompany you, provided that this person furnishes proper identification. I certify that I have received a copy of my FCRA rights herein.

I request to receive a free copy of this report by checking this box.

SecurTest California Safeguards: Pursuant to California laws, SecurTest does not:


- Report criminal records that did not result in a conviction.
- Report records of arrest, indictment, information, misdemeanor complaint, or conviction of a crime that, from the date of disposition, release, or parole, antedates the report by seven (7) years.
- Report records where it is found that a full pardon was granted or where the court sealed or expunged the record.
- Report criminal convictions involving Marijuana that is older than two (2) years from the date of conviction.
- Report criminal conviction involving possession, use, influence, paraphernalia, or presence during use of Marijuana that is older than two (2) years from the date of conviction.

Call SecurTest at 1-800-445-8001 if you have any questions about your background report or believe it contains any of the information restricted under California laws.

I have received a copy of my rights under California law pertaining to my authorization of a background report or consumer report to be issued by SecurTest, Inc. for the organization identified on page 1.

INVESTIGATIVE CONSUMER AGENCY CONDUCTING INVESTIGATION, unless noted herein:
SecurTest, Inc. □ 2500 Daniells Bridge Road, Building 200, Suite 1-B, Athens, GA 30606 □ (800) 445-8001 www.securtest.com

Date Same as date submitted if blank
Date: <input type="text"/>

 (x) (SIGNATURE) 

Employer/User Instructions: Attach all pages on Submission FAX: 866-580-4851 Page 2 v2013 01 01
Instructions: (1) Copy to Subject (2) Original Saved (3) Upload to SecurTest



INSTANT ABILITY TO REVIEW YOUR REPORT. The organization on page 1 uses the exclusive patented iReviewNow, which allows you to review your background (consumer) report at the same time to ensure fairness, accuracy and compliance with federal and state laws and regulations, such as the Fair Credit Reporting Act (FCRA) and Equal Employment Opportunity Commission (EEOC.) **You Benefit:**

- You have an opportunity to see what is being reported about you at the same time or near the same time (contemporaneous reporting) at iReviewNow.com, by email, or from the Employer or User.
- You have an immediate opportunity to make sure the report is your report, make sure you authorized it, and see if your identity has been stolen or is being fraudulently used.
- You have an immediate opportunity to make sure the report is accurate and dispute any information you find to be incomplete or inaccurate. You have an immediate opportunity to explain any information about the report, especially information about your past, and up to date and relevant information that may help the organization consider your feedback or explanations, make a more informed decision, and comply with all laws and regulations.

I agree to the following terms and conditions.

1. I certify that all information on page 1 is my personal information and is accurate.
2. I am the person identified on page 1. I acknowledge that an electronic, scanned, facsimile (FAX), or photographic copy of this consent and release shall be as valid as the original.
3. I am the applicant, employee, or consumer named on page 1 knowing it is a crime to illegally use another person's information to gain access to their consumer or background report.
4. I agree to review the complete background or consumer report about me for accuracy by exclusively using www.iReviewNow.com (hereafter "iReviewNow"). I agree to go to iReviewNow.com or the user of my report if I have no internet or text messaging access, view my report, and immediately answer the iReviewNow questions, and dispute any misleading, inaccurate or incomplete information within 48 hours from the first text or email message or within five business days from today (hereafter "agreed time").
5. I agree to answer ALL questions using iReviewNow about my report, which will be stored for future reference and use by employers, background screening providers, consumer reporting agencies, and SecurTest, Inc., among others authorized and licensed to use the information.
6. The employer, company or organization that requested my report, or the background screening provider or consumer reporting agency, does not need to mail any information or copies of reports to me as I will use iReviewNow in place of the Fair Credit Reporting Act (FCRA) and other state and/or federal laws, regulations, or guidelines. I am responsible for the security of the report sent to me by mail, email or at www.iReviewNow.com. I authorize all notices, letters, reports, consumer rights, and other communications to be transmitted to me at iReviewNow or by email, and certify by my signature below that transmission of such information provides sufficient proof of my receipt as I have provided a valid email address and telephone number where I can receive electronic notifications that a report about me is ready for my immediate review. My failure to review, comment or dispute any information in my report within the "agreed time" shall be my certification that the report is accurate and complete as issued.
7. I understand that iReviewNow (or its licensed consumer reporting agencies or users) only report the information in the report and do not make any positive, negative or adverse employment or other decisions for the user based on the information, as the employer or user of the report is solely responsible for hiring, employment or other lawful decisions. Thus, I hereby release and forever hold harmless SecurTest, Inc., iReviewNow, the information provider and/or user for providing me my report through iReviewNow. I agree to go to **iReviewNow.com to register for automated notification of my report.**
8. I have had an opportunity to read or review my rights under the FCRA found on pages 4 to 6, other applicable regulations, state and federal laws and consult with legal counsel. I further agree that I may rescind this agreement at any time in writing to SecurTest, Inc., which will only apply to future reports about me, as reports previously transmitted to iReviewNow remain the sole property of iReviewNow or SecurTest, Inc., unless I establish in clear and compelling (court certified) evidence that such report is inaccurate. It is my sole responsibility to ensure that reports about me at iReviewNow are accurate.
9. **ELECTRONIC SIGNATURE AUTHORIZATION:** I hereby certify that if I elect to sign electronically that it may be used by the employer, prospective employer, user, iReviewNow®, SecurTest®, Inc., their agents, or authorized third parties to rely on it as if it were my original handwritten signature.

INVESTIGATIVE CONSUMER AGENCY CONDUCTING INVESTIGATION, unless noted herein:

SecurTest, Inc. □ 2500 Daniells Bridge Road, Building 200, Suite 1-B, Athens, GA 30606 □ (800) 445-8001 www.securtest.com
iReviewNow® - © 2005-2013 - Patented Intellectual Property of Steven C. Millwee and SecurTest, Inc. - ALL RIGHTS RESERVED



(x)

(SIGNATURE)



Date Same as date submitted if blank

Date:



Para informacion en espanol, visite www.consumerfinance.gov/learnmore o escribe a la Consumer Financial Protection Bureau, 1700 G Street N.W., Washington, DC 20006.

A Summary of Your Rights Under the Fair Credit Reporting Act

The federal Fair Credit Reporting Act (FCRA) promotes the accuracy, fairness, and privacy of information in the files of consumer reporting agencies. There are many types of consumer reporting agencies, including credit bureaus and specialty agencies (such as agencies that sell information about check writing histories, medical records, and rental history records). Here is a summary of your major rights under the FCRA. **For more information, including information about additional rights, go to www.consumerfinance.gov/learnmore or write to: Consumer Financial Protection Bureau, 1700 G Street N.W., Washington, DC 20006.**

- **You must be told if information in your file has been used against you.** Anyone who uses a credit report or another type of consumer report to deny your application for credit, insurance, or employment – or to take another adverse action against you – must tell you, and must give you the name, address, and phone number of the agency that provided the information.

- **You have the right to know what is in your file.** You may request and obtain all the information about you in the files of a consumer reporting agency (your “file disclosure”). You will be required to provide proper identification, which may include your Social Security number. In many cases, the disclosure will be free. You are entitled to a free file disclosure if:
 - a person has taken adverse action against you because of information in your credit report;
 - you are the victim of identify theft and place a fraud alert in your file;
 - your file contains inaccurate information as a result of fraud;
 - you are on public assistance;
 - you are unemployed but expect to apply for employment within 60 days.

In addition, all consumers are entitled to one free disclosure every 12 months upon request from each nationwide credit bureau and from nationwide specialty consumer reporting agencies. See www.consumerfinance.gov/learnmore for additional information.

- **You have the right to ask for a credit score.** Credit scores are numerical summaries of your credit-worthiness based on information from credit bureaus. You may request a credit score from consumer reporting agencies that create scores or distribute scores used in residential real property loans, but you will have to pay for it. In some mortgage transactions, you will receive credit score information for free from the mortgage lender.

- **You have the right to dispute incomplete or inaccurate information.** If you identify information in your file that is incomplete or inaccurate, and report it to the consumer reporting agency, the agency must investigate unless your dispute is frivolous. See www.consumerfinance.gov/learnmore for an explanation of dispute procedures.

- **Consumer reporting agencies must correct or delete inaccurate, incomplete, or unverifiable information.** Inaccurate, incomplete or unverifiable information must be removed

or corrected, usually within 30 days. However, a consumer reporting agency may continue to report information it has verified as accurate.

- **Consumer reporting agencies may not report outdated negative information.** In most cases, a consumer reporting agency may not report negative information that is more than seven years old, or bankruptcies that are more than 10 years old.
- **Access to your file is limited.** A consumer reporting agency may provide information about you only to people with a valid need – usually to consider an application with a creditor, insurer, employer, landlord, or other business. The FCRA specifies those with a valid need for access.
- **You must give your consent for reports to be provided to employers.** A consumer reporting agency may not give out information about you to your employer, or a potential employer, without your written consent given to the employer. Written consent generally is not required in the trucking industry. For more information, go to www.consumerfinance.gov/learnmore.
- **You may limit “prescreened” offers of credit and insurance you get based on information in your credit report.** Unsolicited “prescreened” offers for credit and insurance must include a toll-free phone number you can call if you choose to remove your name and address from the lists these offers are based on. You may opt-out with the nationwide credit bureaus at 1-888-567-8688.
- **You may seek damages from violators.** If a consumer reporting agency, or, in some cases, a user of consumer reports or a furnisher of information to a consumer reporting agency violates the FCRA, you may be able to sue in state or federal court.
- **Identity theft victims and active duty military personnel have additional rights.** For more information, visit www.consumerfinance.gov/learnmore.

Sign here

States may enforce the FCRA, and many states have their own consumer reporting laws. In some cases, you may have more rights under state law. For more information, contact your state or local consumer protection agency or your state Attorney General. For information about your federal rights, contact:

TYPE OF BUSINESS:

- 1.a. Banks, savings associations, and credit unions with total assets of over \$10 billion and their affiliates.
- b. Such affiliates that are not banks, savings associations, or credit unions also should list, in addition to the Bureau:

- 2. To the extent not included in item 1 above:
 - a. National banks, federal savings associations, and federal branches and federal agencies of foreign banks
 - b. State member banks, branches and agencies of foreign banks (other than federal branches, federal agencies, and insured state branches of foreign banks), commercial lending companies owned or controlled by foreign banks, and organizations operating under section 25 or 25A of the Federal Reserve Act
 - c. Nonmember Insured Banks, Insured State Branches of Foreign Banks, and insured state savings associations
 - d. Federal Credit Unions
- 3. Air carriers
- 4. Creditors Subject to Surface Transportation Board
- 5. Creditors Subject to Packers and Stockyards Act
- 6. Small Business Investment Companies
- 7. Brokers and Dealers
- 8. Federal Land Banks, Federal Land Bank Associations, Federal Intermediate Credit Banks, and Production Credit Associations
- 9. Retailers, Finance Companies, and All Other Creditors Not Listed Above

CONTACT:

- a. Bureau of Consumer Financial Protection
1700 G Street NW
Washington, DC 20006
- b. Federal Trade Commission: Consumer Response Center – FCRA
Washington, DC 20580
(877) 382-4357

- a. Office of the Comptroller of the Currency
Customer Assistance Group
1301 McKinney Street, Suite 3450
Houston, TX 77010-9050
- b. Federal Reserve Consumer Help Center
P.O. Box 1200
Minneapolis, MN 55480
- c. FDIC Consumer Response Center
1100 Walnut Street, Box #11
Kansas City, MO 64106
- d. National Credit Union Administration
Office of Consumer Protection (OCP)
Division of Consumer Compliance and Outreach (DCCO)
1775 Duke Street
Alexandria, VA 22314
Asst. General Counsel for Aviation Enforcement & Proceedings
Department of Transportation
400 Seventh Street SW
Washington, DC 20590
Office of Proceedings, Surface Transportation Board
Department of Transportation
1925 K Street NW
Washington, DC 20423

Nearest Packers and Stockyards Administration area supervisor

- Associate Deputy Administrator for Capital Access
United States Small Business Administration
406 Third Street, SW, 8th Floor
Washington, DC 20416
Securities and Exchange Commission
100 F St NE
Washington, DC 20549
Farm Credit Administration
1501 Farm Credit Drive
McLean, VA 22102-5090
FTC Regional Office for region in which the creditor operates or
Federal Trade Commission: Consumer Response Center – FCRA
Washington, DC 20580
(877) 382-4357

Sign here

Request for Taxpayer Identification Number and Certification

**Give Form to the
 requester. Do not
 send to the IRS.**

Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	Check appropriate box for federal tax classification: <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <input type="checkbox"/> Other (see instructions) ▶ _____	
	<input type="checkbox"/> Exempt payee	
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
City, state, and ZIP code		
List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number									

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Employer identification number									

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here	Signature of U.S. person ▶	Date ▶
------------------	----------------------------	--------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.



Agent Transfer Guide



USER MANUAL | We'll guide you through

Table of Contents

Introduction	1
Agent Transfer Request form:.....	1
Step 1: Destination Broker Info	3
Step 2: Contact Info	4
Step 3: Personal Assistants	4
Step 4: Review & Submit	6
Error Messaging:	7
Listing Transfer Requests	8
Approval of Agent Transfer Requests – For Brokers and Designated Authorized Signers	8
Statuses of Agent Transfer Requests.....	11

Introduction

Agents will be able to request a transfer from one office to another in a few short steps. The Agent Transfer Request link is now available for an agent to submit a transfer request electronically.

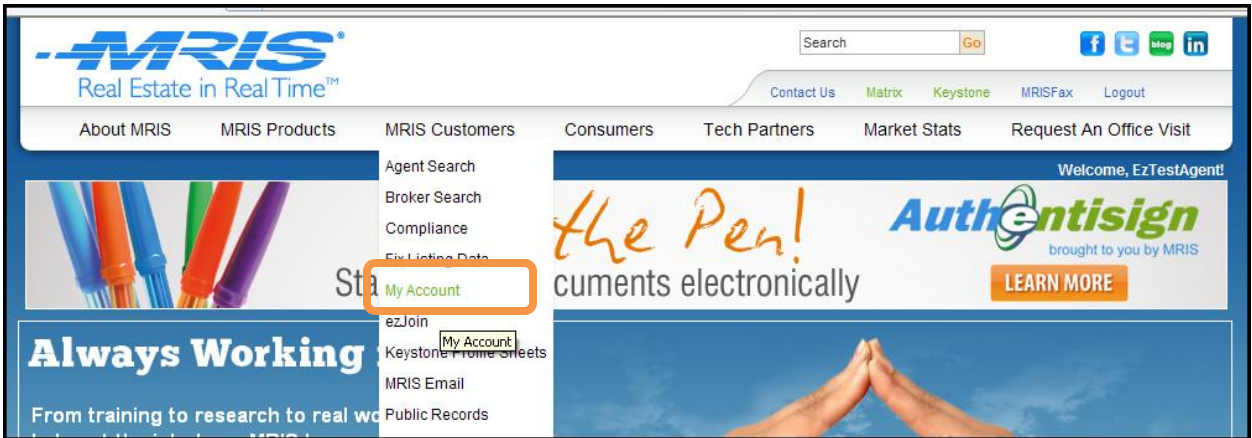
There are several new features in using this transfer request:

- No more faxing the Agent Transfer Request form by Agents requesting their transfer from one office to another.
- The online form is submitted to the new (destination) office Broker or Authorized Signer for approval electronically, similar to ezJoin applications. Their approval must be complete within 7 days of the request or it is cancelled.
- Email notifications are sent to the agent that the request has been submitted for approval.
- Email notifications are sent to the new (destination) office Broker or Authorized Signer for approval.
- Reminder email notifications are sent to the Broker or Authorized Signer before the 7 day timeframe for approval.
- Email notification is sent to the origination office that the transfer was completed.
- Email notification is sent to any personal assistants in the origination office if they need to act to get reassigned or request their own transfer on Form 805.
- Once a transfer is approved by the destination office, the transfer is completed immediately by the system.

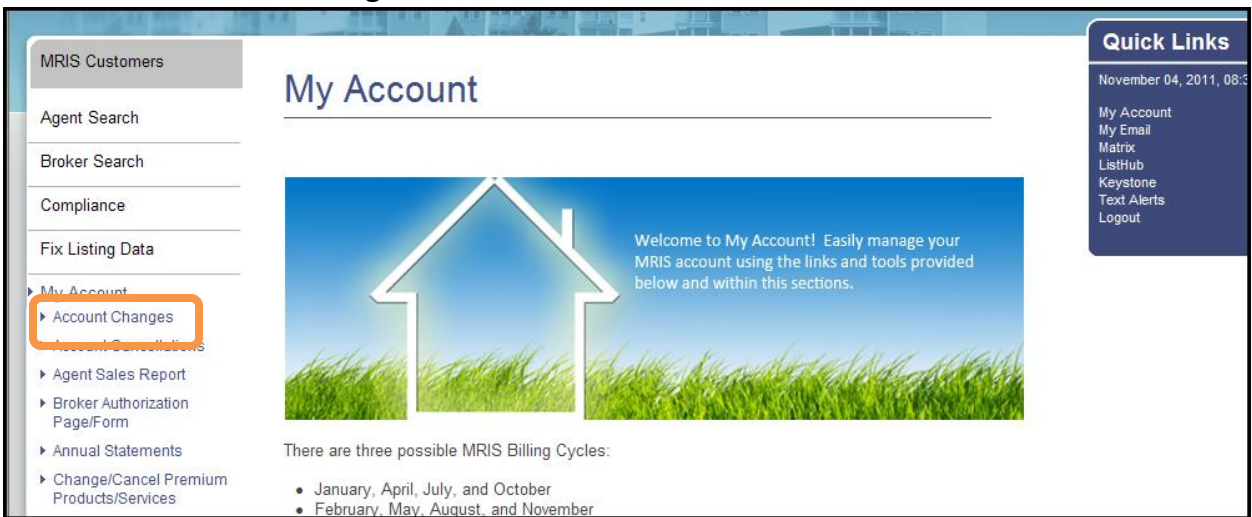
Agent Transfer Request form:

An agent may request a transfer to another office by accessing the Online Agent Transfer Request link on the mris.com/My Account page.

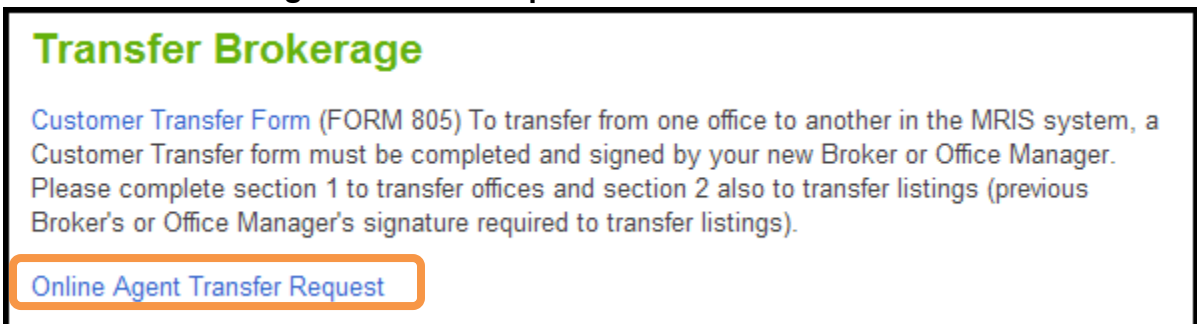
- Log into mris.com
- Hover over **MRIS Customers**
- Click on **My Account**



- Click on the **Account Changes** link



- Click on the **Online Agent Transfer Request** link



- Once the form loads there are four quick and easy steps to complete the request
 - Step 1 – enter in new office Broker Code
 - Step 2 - validate office information and identify the email address
 - Step 3 – Personal Assistant, if any is identified
 - Step 4 – request successfully submitted for approval by the new office, confirmation message

Step 1: Destination Broker Info

In this step you will enter in the Destination Broker Code for the office you wish to transfer to.

Agent Transfer Request

Step 1: Destination Broker Info > Step 2: Contact Info > Step 3: Personal Assistants > Step 4: Review & Submit

This is your request to transfer Broker offices. You will be asked to verify and edit your contact information for your private email address and submit your request to transfer. Once your request is submitted, your new Broker is automatically notified. Please follow up with them within the next seven days to ensure the transfer is complete.

EsignMBSeventeen Seventeen

Origination Office:
TestEztransfer04 (EZTR04)
274 INTEREST RATE CIR
ROCKVILLE, MD 20850

Destination Broker Code *

Enter your Broker's Office code and click the Verify button. The system will automatically display the Broker Office Name and address. If you do not know the Broker's Office code, please contact your Broker.

- Enter the **Destination Broker Code** for the new office. You can obtain this information from the new Broker's office.
- Click the **Verify** button
- The system will display the origination Broker office (your current office) and the destination Broker office (the office you wish to transfer to) information with the Name of the office, the Broker Code number and the street address of the office.

Agent Transfer Request

Step 1: Destination Broker Info > Step 2: Contact Info > Step 3: Personal Assistants > Step 4: Review & Submit

This is your request to transfer Broker offices. You will be asked to verify and edit your contact information for your private email address and submit your request to transfer. Once your request is submitted, your new Broker is automatically notified. Please follow up with them within the next seven days to ensure the transfer is complete.

EsignMBSeventeen Seventeen

Origination Office:
TestEztransfer04 (EZTR04)
274 INTEREST RATE CIR
ROCKVILLE, MD 20850

Destination Office:
TestEztransfer05 (EZTR05)
135 SETTLEMENT WAY
ROCKVILLE, MD 20850

[<Edit](#)

- Use the blue **<Edit** link if you wish to change the Destination office
- Click the blue **Continue** button

Step 2: Contact Info

In this step, the system will display the current private email address on file with MRIS.

- The default will be to use the private email address you have on file with MRIS. Then click the blue Continue button.

The screenshot shows the 'Agent Transfer Request' form in the MRIS system. The form is titled 'Agent Transfer Request' and has the MRIS logo in the top right corner. The form is divided into four steps: Step 1: Destination Broker Info, Step 2: Contact Info (highlighted in black), Step 3: Personal Assistants, and Step 4: Review & Submit. Below the steps, the form displays the 'EsignMBSeventeen Seventeen' section. It shows the 'Origination Office' and 'Destination Office' information. The 'Origination Office' is 'TestEztransfer04 (EZTR04)' at '274 INTEREST RATE CIR, ROCKVILLE, MD 20850'. The 'Destination Office' is 'TestEztransfer05 (EZTR05)' at '135 SETTLEMENT WAY, ROCKVILLE, MD 20850'. There is a '<Edit' link below the destination office information. Below the office information, there is a paragraph of text: 'The private email address listed below is on file with MRIS for all communications regarding your account. If this information is correct, please click Continue. If not, please click the Cancel button. Go to MRIS.com/My Account/Account Changes to update your private email address with MRIS.' Below this text, there is a radio button and the text 'Use qatemail@mriss.net'. At the bottom of the form, there are two buttons: 'Cancel' and 'Continue >'. The 'Continue >' button is highlighted with an orange box.

- If you wish to enter in a new email address, you will need to Cancel the Agent Transfer Request then go to MRIS.com/My Account/Account Changes to update your email address.

Step 3: Personal Assistants

If your current office has Personal Assistants, you will be asked to designate the Personal Assistant that is assigned to you. This selection will notify the Personal Assistant, when your transfer is approved, to either fill out a transfer request to the new office, for the current Broker to reassign the Personal Assistant to another agent within their office or to terminate their subscription to MRIS. This process will not transfer the Personal Assistant. Only an agent can request to be transferred through this new online form.

Office with Personal Assistants:

- All of the Personal Assistants in the origination office location will be listed.
- Select none, one or more of the names listed by clicking on the line or checking the box on the right side of the screen.
- Click the blue **Continue** button

- Once the Agent Transfer Request is approved by the destination broker's office, the personal assistant(s) will be sent an email notifying them of your move to another office and instructions to follow.

The screenshot shows the 'Agent Transfer Request' form in the MRIS system. The progress bar indicates Step 3 'Personal Assistants' is active. Below the progress bar, a message reads: 'Please select the personal assistant(s) assigned to you from the list below.' A table lists one personal assistant:

First Name	Last Name	Title	
TestEztr	PAtoEzAgentTwo	Personal Assistant	<input type="checkbox"/>

At the bottom of the form, there are 'Cancel' and 'Continue >' buttons. A red arrow points to the 'TestEztr' entry in the table.

Office with no Personal Assistants:

- If the current office has no Personal Assistants a message will be displayed.
- Click the blue Continue button

The screenshot shows the 'Agent Transfer Request' form in the MRIS system. The progress bar indicates Step 3 'Personal Assistants' is active. Below the progress bar, a message reads: 'No personal assistants found.' At the bottom of the form, there are 'Cancel' and 'Continue >' buttons.

Step 4: Review & Submit

In this step you will review all the information for this Agent Transfer Request. You will want to verify the information before submitting the request. Use the <-Edit links to change information

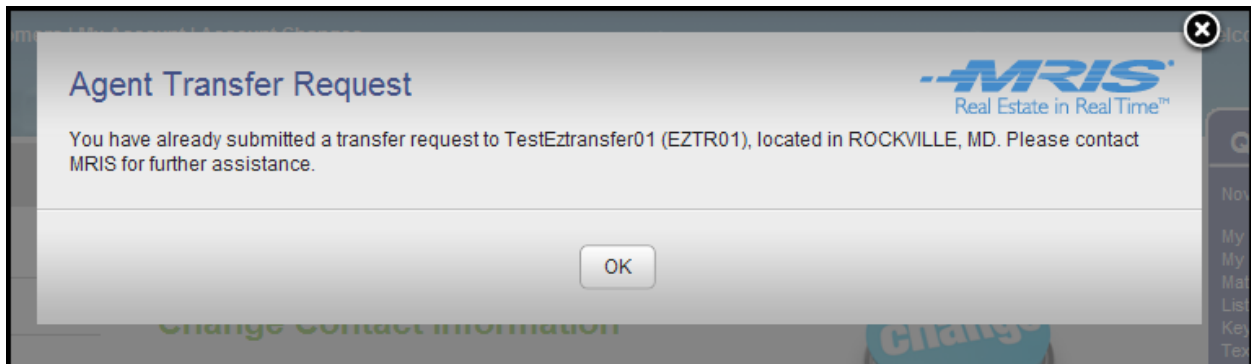
The screenshot shows the 'Agent Transfer Request' window in the MRIS system. At the top, there are four steps: Step 1 (Destination Broker Info), Step 2 (Contact Info), Step 3 (Personal Assistants), and Step 4 (Review & Submit), which is currently active. The main content area is titled 'EsignMBSeventeen Seventeen'. It is divided into four sections: 'Origination Office' (TestEztransfer04 (EZTR04), 274 INTEREST RATE CIR, ROCKVILLE, MD 20850), 'Destination Office' (TestEztransfer05 (EZTR05), 135 SETTLEMENT WAY, ROCKVILLE, MD 20850), 'Contact Email' (gatestemail@mriss.net), and 'Personal Assistants Selected' (None). Each section has a '<Edit' link. At the bottom, there are 'Cancel' and 'Submit >' buttons. The 'Submit >' button is highlighted with an orange box.

- Review the Destination Office, edit if necessary
- Review the private email address where all notifications will be sent
- Review the Personal Assistants Selected, edit if necessary
- Click the blue **Submit** button
- You will receive an email notification that your request has been sent to the Broker/Authorized Signers of the destination office for review.
- The Broker/Authorized Signers of the destination office will receive an email notification that a request is pending their approval.

Error Messaging:

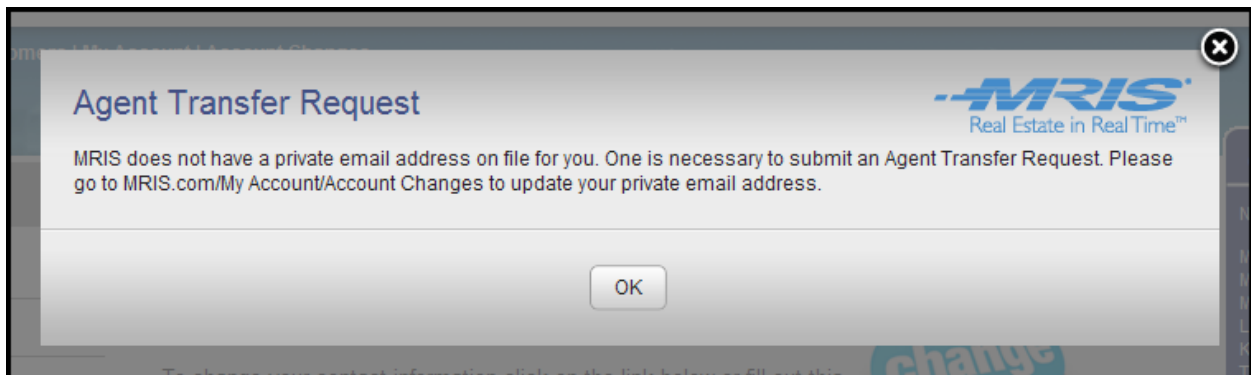
Pending Agent Transfer Request message

If you have already submitted an Agent Transfer Request, but the Broker office has not approved or declined the request, the system will not permit another request to be submitted.



No private email on file with MRIS:

If you do not have a private email address on file with MRIS, the error message below will appear. You must go to the My Account update screen to update your private email address as one is needed to submit an Agent Transfer Request.



Listing Transfer Requests

Once you receive your email that the transfer was approved by the new (destination office), if you have listings to transfer you must fill out the Customer Change Form (Form 805).

NOTE: the Agent Transfer must have a Close/Authorized Signer Approved status for the agent to request listings to be transferred. The Agent must use the Customer Transfer Form (Form 805) located on mris.com to request listings to be transferred. Only section B of the Form 805 must be filled out and both Broker Signatures are required. The form will be faxed to MRIS and processed according to our normal procedures.

To access the Form 805

- ***Login to mris.com***
- ***Hover over My Account***
- ***Click on Account Changes***
- ***Click the Customer Change Form (Form 805)***
- ***Fill out only section B***
- ***Have both Brokers sign the form***
- ***Fax to MRIS at _____***

Approval of Agent Transfer Requests – For Brokers and Designated Authorized Signers

Once an Agent Transfer Request is submitted, an email will be sent to the agent and the office Broker or the Authorized Signer they have designated. The Broker/Authorized Signer has 7 days to approve or decline this request. If the approval/decline does not happen by 4 days, an email reminder will be sent to the agent and office. If the approval/decline does not happen by 7 days, the system will close the request and emails notifications will be sent.

The Broker or the Authorized Signer will need to access the Pending Agent Transfer Request link under Manage My Office. This link appears right under Pending Applications.

- Log into mris.com
- Hover over **MRIS Customers**
- Click on the **Manage My Office**
- Click on the **Pending Agent Transfer Request** link
- The system will load the Manage My Office screens.

- Depending on my authority to approve/decline applications and agent transfers, the appropriate links will appear. All Brokers and designated Authorized Signers will have the authority to view and then disposition both applications and agent transfer requests.

The screenshot shows the MRIS 'MANAGE MY OFFICE' interface. At the top left is the MRIS logo with the tagline 'Real Estate in RealTime™'. To the right is the text 'MANAGE MY OFFICE' in green. In the top right corner, there is a link 'Return to MRIS'. Below the header, there is a navigation bar with 'Home | Agent Transfer Requests'. The main content area is titled 'Agent Transfer Requests' and includes a sidebar with 'EzTestAgent EzAtrFive', 'Pending Applications', and 'Agent Transfer Requests'. Below the title, there is an 'Optional Filters' section with a 'show' link. A summary line states '1 agent transfer request for offices under your authority'. Below this is a table with the following data:

First Name	Last Name	Date		Orig	Dest	Status / Reason
EzTestAgent	EzAtrFive	11/01/2011	0 days left	EZTR05	EZTR01	In Progress / Pending Approval

- Any Agent Transfer Requests that must have an action taken – to approve or decline will be displayed.
- If none, 0 agent transfer request for offices under your authority will be displayed.
- To access any pending requests the following information will be available to access the Details screen to approve or decline.
- Locate the First/Last Name of the individual you want to review –click the line for that individual
- Note the date of the agent request with a number of days left for the destination office to approve or decline the request. There are seven (7) days for the Broker of Authorized Signer to approve or decline the request.
- The Agent Transfer Details screen will display
 - Received On: date the request was submitted by the agent
 - Status: In Progress/Pending Approval
 - Decision Deadline: the office must approve or decline within 7 days of the agent request.

The screenshot shows the 'Agent Transfer Request Details' screen. It includes the MRIS logo and the following information:

Received On: 11/01/2011
Status: In Progress / Pending Approval
Decision Deadline: 11/03/2011

EzTestAgent EzAtrFive
uma.peddi@mriss.net

Origination Office
TestEztransfer05(EZTR05)
135 SETTLEMENT WAY
ROCKVILLE, MD 20850

Destination Office
TestEztransfer01(EZTR01)
123 REALTY STREET UNDEF
ROCKVILLE, MD 20850

Please review and verify that the above Agent Transfer Request detail is correct. In order to Decline or Approve the Agent Transfer Request you are first required to read and accept the Broker/Authorized Signer Additional Terms and Conditions (link below). After selecting that you accept the Additional Terms and Conditions, then click Approve or Decline to complete the Agent Transfer Request approval process. If any of the information is incorrect you will need to Decline the Agent Transfer Request. The agent submitting the request will be notified by email of your decision.

At the bottom, there are buttons for 'Cancel', 'Approve', and 'Decline', along with a checkbox for 'I accept the Additional Terms and Conditions'.

- Verify the user name who is requesting to come into your office.
- View the Origination Office and verify your office is the Destination Office
- You must read the Additional Terms and Conditions and check the 'I accept' box.
- Once you check the box by the terms and conditions, the blue Approve button and the red Decline buttons activate.

Agent Transfer Request Details

Received On: 11/01/2011
 Status: In Progress / Pending Approval
 Decision Deadline: 11/03/2011

EzTestAgent EzAtrFive
 uma.peddi@mriss.net

Origination Office	Destination Office
TestEztransfer05(EZTR05) 135 SETTLEMENT WAY ROCKVILLE, MD 20850	TestEztransfer01(EZTR01) 123 REALTY STREET UNDEF ROCKVILLE, MD 20850

Please review and verify that the above Agent Transfer Request detail is correct. In order to Decline or Approve the Agent Transfer Request you are first required to read and accept the Broker/Authorized Signer Additional Terms and Conditions (link below). After selecting that you accept the Additional Terms and Conditions, then click Approve or Decline to complete the Agent Transfer Request approval process. If any of the information is incorrect you will need to Decline the Agent Transfer Request. The agent submitting the request will be notified by email of your decision.

Cancel I accept the Additional Terms and Conditions Approve Decline

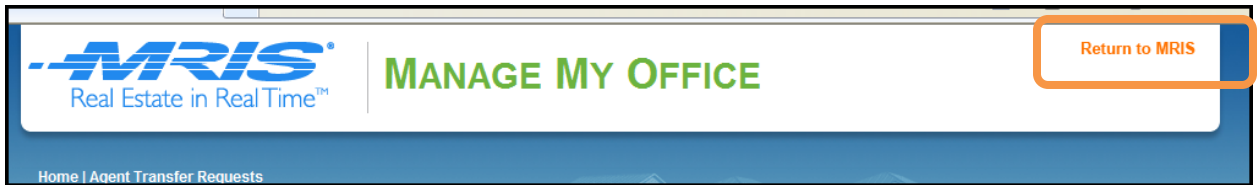
- If you decide to approve this agent to transfer to your office, click the blue Approve button.
- If you decide to decline this agent to transfer to your office, click the red Decline button.
- Approving the request will have the system automatically do several steps:
 - Changes the Broker Code to your office for that agent
 - Removes any Authorized Signer role if applicable from the agent
 - Email is sent to the Agent of their successful transfer to your office
 - Email notification is sent to their Origination Office Broker/Office Managers
 - Email notification to any personal assistant that the agent designated in their Origination Office
 - Changes the status of this request to Closed/Authorized Signer Approved

NOTE: the Agent Transfer must have a Close/Authorized Signer Approved status for the agent to request listings to be transferred. The Agent must use the Customer Transfer Form (Form 805) located on mriss.com to request listings to be transferred. Only section B of the Form 805 must be filled out and both Broker Signatures are required. The form will be faxed to MRIS and processed according to our normal procedures.

To access the Form 805

- ***Log into mriss.com***
- ***Hover over My Account***

- **Click on Account Changes**
 - **Click the Customer Change Form (Form 805)**
 - **Fill out only section B**
 - **Have both Brokers sign the form**
 - **Fax to MRIS**
- Declining the request will have the system automatically do several steps:
 - Does not change the Broker Code of the agent
 - Email notification is sent to the agent of your decision to decline the transfer into your office.
 - Changes the status of this request to Closed/Authorized Signer Declined
 - Click the Return to MRIS link on the top right to return to mris.com



States of Agent Transfer Requests

There are several statuses that an Agent Transfer request can be in the system. Only Brokers and their designated Authorized Signers can view these statuses.

- To access these statuses, click the **hide** link next to **Optional Filters**
- Click on the arrow in the Request Status to view the entire list of Agent Transfer Requests

First Name	Last Name	Date	Orig	Dest	Status / Reason
EzTestAgent	EzAtrFive	11/01/2011	EZTR05	EZTR01	In Progress / Pending Approval

- **Show all** – see all transfer requests under any of the statuses received in offices under your authority.

Agent Transfer Requests

Optional Filters [hide](#)

Request Status

From To

Name

Origination Office Destination Office

16 agent transfer requests for offices under your authority

First Name	Last Name	Date	Orig	Dest	Status / Reason
EZTestAgent	EzAtrTwo	11/02/2011	EZTR02	EZTR01	Closed / Authorized Signer Approved
TestEztr	EzAgentFive	11/02/2011	EZTR05	EZTR01	Closed / Authorized Signer Approved
TestEztr	EzAgentThree	11/01/2011	EZTR04	EZTR01	Closed / Cancelled
EzTestAgent	EzAtrFive	11/01/2011	EZTR05	EZTR01	In Progress / Pending Approval 0 days left

- **In Progress/Pending Approval** – an agent transfer request has been submitted to the destination office for review to approve or decline

Agent Transfer Request Details

Received On: 11/01/2011
 Status: In Progress / Pending Approval
Decision Deadline: 11/03/2011

EzTestAgent EzAtrFive
 uma.peddi@mrismet.net

Origination Office
 TestEztransfer05(EZTR05)
 135 SETTLEMENT WAY
 ROCKVILLE, MD 20850

Destination Office
 TestEztransfer01(EZTR01)
 123 REALTY STREET UNDEF
 ROCKVILLE, MD 20850

Please review and verify that the above Agent Transfer Request detail is correct. In order to Decline or Approve the Agent Transfer Request you are first required to read and accept the Broker/Authorized Signer Additional Terms and Conditions (link below). After selecting that you accept the Additional Terms and Conditions, then click Approve or Decline to complete the Agent Transfer Request approval process. If any of the information is incorrect you will need to Decline the Agent Transfer Request. The agent submitting the request will be notified by email of your decision.

I accept the [Additional Terms and Conditions](#)

- **Closed/Authorized Signer Approved** – the Broker or Designated Authorized Signer has approved the request to transfer. The system has changed the Broker Code in the MRIS systems to the new office.

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ation

Req

Agent Transfer Request Details

MRIS
Real Estate in Real Time™

Received On: 11/02/2011
Status: Closed / Authorized Signer Approved

EZTestAgent EzAtrTwo
uma.peddi@mriss.net

Origination Office	Destination Office
TestEztransfer02(EZTR02) 345 MORTGAGE AVE GAITHERSBURG, MD 20852	TestEztransfer01(EZTR01) 123 REALTY STREET UNDEF ROCKVILLE, MD 20850

This agent transfer request has been approved by the Broker or their authorized signer.

Close

Origination Office Destination Office

- **Closed/Authorized Signer Declined** – the Broker or Designated Authorized Signer has declined the request.

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ation

Req

Agent Transfer Request Details

MRIS
Real Estate in Real Time™

Received On: 10/14/2011
Status: Closed / Authorized Signer Declined

Ez TestAgent EzAtrFive
uma.peddi@mriss.net

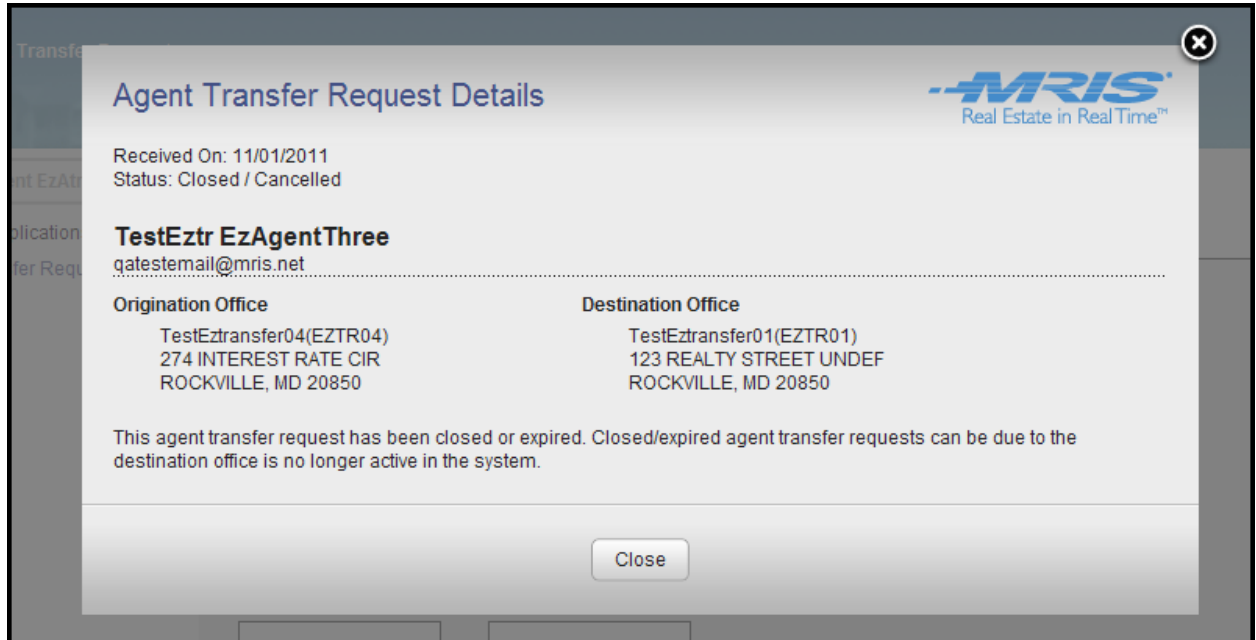
Origination Office	Destination Office
TestEztransfer05(EZTR05) 135 SETTLEMENT WAY ROCKVILLE, MD 20850	TestEztransfer01(EZTR01) 123 REALTY STREET UNDEF ROCKVILLE, MD 20850

This agent transfer request has been declined by the Broker or their authorized signer.

Close

Origination Office Destination Office

- **Closed/Cancelled** – the request is cancelled when the agent is inactivated or the office they requested to transfer to is no longer active in MRIS.



- **Closed/Expired** – the request was not approved or declined within the 7 day window and therefore closes and expires. A new request must be submitted if needed.

