

# Real Estate Agent Handbook

## Assess your needs

- A welcome letter from the CEO**
  - Written
  - Needed
- Mission, vision, values, guiding principles**
  - Written
  - Needed
- Company culture and practices**
  - History
    - Written
    - Needed
  - Evolution
    - Written
    - Needed
  - Current expectations
    - Written
    - Needed
- Basic brokerage information**
  - Address, phone number, website, general email address
  - Hours of operation and building access
  - Parking
  - Company events and holidays



## **An organizational chart**

### Executives

Photos

Bios

### Managers

Photos

Bios

### Administrative staff

Photos

Bios

## **Financial details**

What standard fees (besides commission) do you charge agents?  
How will they be paid?

Do you want to include a standard commission sheet?

Or a blank worksheet where you can add specifics for each individual agent?

How will agents be paid?

Check?

Direct deposit?

Do you ask agents to set up different bank accounts for taxes, brokerage fees,  
and other expenses?

Include details about how they should arrange these accounts

Preferred banking partners

## **Partnerships or marketing agreements**

Mortgage

Title

Bridge loan providers

Cash offer providers

iBuyers



## **Policies, rules, regulations**

- Anti-discrimination policy
- Anti-sexual-harassment policy
- Whistleblower procedure
- Complaint procedure or process
- Mediation guidelines
- Health and safety

## **Real estate compliance**

- Laws and expectations in the state
- Discussion of how your brokerage handles compliance
- Clear guidelines and agent expectations

## **Independent contractor disclaimer**

## **FAQs**

- What FAQs do agents have that are not covered?
  - Ask your current agents to review the handbook and add Qs
  - Ask your admin staff, managers, and executives to review the handbook and add Qs