

**[REAL ESTATE AGENCY NAME]**

**POLICY & PROCEDURES MANUAL**

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## Table of Contents

<b>PART 1: INTRODUCTION .....</b>	<b>Page 7</b>
WELCOME .....	Page 7
MISSION STATEMENT .....	Page 7
The Evolution of Real Estate in the 21st Century.....	Page 7
Pillars of [AGENCY NAME]'s Commitment.....	Page 7
Anticipations for Sales Professionals .....	Page 8
THE REAL ESTATE BROKER'S ACT .....	Page 8
Accountability of [AGENCY NAME] under License Laws.....	Page 8
Key Statutes and Guidelines Realtors Must Grasp: .....	Page 8
Financial Oversight & Client Identification .....	Page 8
Regulations Surrounding Consumer Outreach: .....	Page 9
Office Protocols Established by [AGENCY NAME] .....	Page 9
Clarification on Realtor Affiliation with [AGENCY NAME] .....	Page 9
INDEPENDENT CONTRACTOR STATUS .....	Page 9
OVERALL GOALS AND OBJECTIVES .....	Page 10
<b>PART 2: BROKER (COMPANY) RESPONSIBILITIES .....</b>	<b>Page 10</b>
<b>PART 3: OFFICE PROCEDURES .....</b>	<b>Page 11</b>
GENERAL .....	Page 11
STANDARD BUSINESS TIMES .....	Page 11
RECOGNIZED PUBLIC HOLIDAYS .....	Page 11
VACATION.....	Page 11
LEAVING THE OFFICE AFTER HOURS .....	Page 11
PARKING .....	Page 12
BOARD ROOM AND OFFICE USAGE .....	Page 12
POSTAGE COSTS.....	Page 12
COPY MACHINE.....	Page 12
BUSINESS CARDS, BADGES, DESK PLATES .....	Page 12
CELL PHONE GUIDELINES.....	Page 13
SMOKE-FREE ZONE: .....	Page 13
PROFESSIONAL ATTIRE.....	Page 13
AWARDS AND CONTESTS .....	Page 14
STAFF ROLES AT THE OFFICE .....	Page 14
Carly Smith .....	Page 14

Shawn Joeblow .....	Page 14
Justine Doe .....	Page 14
MEMBERSHIP CRITERIA .....	Page 14
BUSINESS PRACTICES .....	Page 15
OFFICE RECORDS .....	Page 15
FUND HANDLING RELATED TO PURCHASE PROPOSALS .....	Page 15
FEEES ASSOCIATED WITH MULTIPLE LISTING SERVICE (MLS) .....	Page 15
CORPORATE MEETINGS .....	Page 15
OTHER MEETINGS OFFERED BY THE WINNIPEG REAL ESTATE BOARD .....	Page 16
KEYS .....	Page 16
LOCK BOX LOCATION .....	Page 16
LOCK BOX NOTIFICATIONS .....	Page 16
ACTIVITY RECORDS .....	Page 16
GENERAL WORK CONTRACTS .....	Page 16
STAYING CONNECTED WITH THE OFFICE .....	Page 16
PROTOCOLS FOR REALTORS IN PROPERTY TRANSACTIONS.....	Page 17
PROTOCOLS FOR REALTORS ENGAGING IN PERSONAL TRANSACTIONS.....	Page 17
ROLE OF ASSISTANTS IN REAL ESTATE .....	Page 18
ASSISTANTS WITHOUT REGISTRATION.....	Page 18
HANDLING REFERRAL OF EXPERTS .....	Page 20
DUAL REPRESENTATION IN REAL ESTATE TRANSACTIONS (WORKING AS THE BUYING & SELLING AGENT ) .....	Page 21
The Significance of Time Clauses .....	Page 21
Salesperson's Accountability in Time-bound Offers .....	Page 21
Upholding Professional Integrity .....	Page 22
<b>PART 4: ADVERTISING AND PROMOTION .....</b>	<b>Page 22</b>
GENERAL POLICY FOR [AGENCY NAME] AGENTS .....	Page 22
SIGNAGE: A KEY MARKETING TOOL .....	Page 22
LEVERAGING SOCIAL MEDIA FOR PROMOTION.....	Page 23
CLIENT-CENTRIC ADVERTISING .....	Page 23
<b>PART 5: PROSPECTS/LISTINGS.....</b>	<b>Page 23</b>
PROTOCOLS WHEN A PROSPECT SEEKS A SALESPERSON.....	Page 23
NAVIGATING DUPLICATE INTERACTIONS WITH PROSPECTS .....	Page 24
CRITERIA FOR PROSPECT MANAGEMENT AND WITHDRAWAL.....	Page 24
OBLIGATIONS OF THE LISTING SALESPERSON.....	Page 24

ESTIMATE OF SELLERS CHARGES .....	Page 24
LISTING CONTRACT .....	Page 24
LISTING INFORMATION SHEET .....	Page 25
Keeping Vendors Updated on Market Conditions and Strategies .....	Page 25
Navigating Multiple Offers and Offer Presentations .....	Page 25
Communication Standards and Acceptance Policies .....	Page 25
Counter Offers, Deposits, and Sale Reporting .....	Page 26
WITHDRAWN OR TRANSFERRED LISTINGS .....	Page 26
CANCELLATION OF SALE.....	Page 26
<b>PART 6: [AGENCY NAME]'s OPEN HOUSE GUIDELINES .....</b>	<b>Page 27</b>
OPEN HOUSE SCHEDULING PROTOCOLS .....	Page 27
ADVERTISING CONSIDERATIONS FOR OPEN HOUSES .....	Page 27
SIGNAGE PREPARATIONS AND COMPLIANCE.....	Page 27
PROTOCOLS FOR UNATTENDED OPEN HOUSES .....	Page 28
<b>PART 7: DOCUMENTATION .....</b>	<b>Page 28</b>
RETENTION OF RECORDS.....	Page 28
TRUST FUND RECORDS .....	Page 28
<b>PART 8: COMMISSIONS GUIDELINES.....</b>	<b>Page 29</b>
GUIDELINES.....	Page 29
BROKERAGE FEE STRUCTURE AT [AGENCY NAME] .....	Page 29
FLEXIBILITY IN COMMISSION CHARGES .....	Page 29
ETHICS AND TRANSPARENCY IN COMMISSION PAYMENTS .....	Page 29
ALTERATIONS AND ARBITRATIONS IN COMMISSIONS .....	Page 29
HEALTH BENEFITS.....	Page 30
Health Benefits at [AGENCY NAME].....	Page 30
<b>PART 9: TRAINING PROGRAMS.....</b>	<b>Page 32</b>
SIGNIFICANCE OF TRAINING .....	Page 32
MODALITIES OF TRAINING.....	Page 32
BENEFITS OF CONTINUOUS LEARNING .....	Page 32
EXPECTATIONS AND ENCOURAGEMENTS .....	Page 32
<b>PART 10: TERMINATION PROCEDURES.....</b>	<b>Page 33</b>
UNSOLD LISTINGS: TRANSFER AND DISCRETION .....	Page 33
PENDING LISTINGS: DELEGATION AND COMPENSATION.....	Page 33
PROTECTION OF INTERNAL INFORMATION .....	Page 33
RETURN OF COMPANY ASSETS AND OBLIGATORY NOTIFICATIONS .....	Page 33

**PART 11: FINTRAC ..... Page 35**

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---

OVERVIEW .....	Page 35
MANDATE AND IMPLEMENTATION .....	Page 35
Key Policy Areas.....	Page 35
Guidance and Further Information.....	Page 35
Mandatory Reporting to Fintrac.....	Page 36
Essential Record-Keeping Norms .....	Page 36
Ascertaining Identity.....	Page 36
Third-Party Engagement.....	Page 37
Consequences for Non-Compliance.....	Page 37
Compliance Program and Role of the Compliance Officer .....	Page 37
FINTRAC's Oversight Role .....	Page 38
Compliance Training for [AGENCY NAME] Staff.....	Page 38
Obligation of Reporting Suspicious Transactions.....	Page 38
Necessary Data for Suspicious Transaction Reports .....	Page 39
Procedure for Reporting Suspicious Activities .....	Page 39
Indicators of Suspicious Transactions .....	Page 39
Mandatory Record-keeping for Terrorist Property Reporting .....	Page 40
Suspected Terrorist Financing Protocols.....	Page 40
Steps for Filing a Terrorist Property Report with FINTRAC.....	Page 41
Obligation to Report to the RCMP and CSIS.....	Page 41
Guidelines on Reporting Large Cash Transactions .....	Page 41
RECORD KEEPING IN [AGENCY NAME] .....	Page 42
Essential Record-Keeping Policies:.....	Page 42
Large Cash Transactions - The FINTRAC Framework.....	Page 42
Mandatory Details on the Forms:.....	Page 42
Retention Period.....	Page 43
IDENTITY REQUIREMENTS .....	Page 43
Identity Verification Responsibilities.....	Page 43
Requirements for Large Cash Transactions.....	Page 43
Third-Party Involvement Protocols .....	Page 43
Procedure Post-Documentation .....	Page 44
LEGAL ISSUES AROUND REPORTING .....	Page 44
UPHOLDING INDIVIDUAL PRIVACY WITHIN FINTRAC.....	Page 44
FINTRAC'S DILIGENCE IN DISCLOSURE .....	Page 45

PROTECTION AND PENALTIES WITHIN THE FINTRAC FRAMEWORK .....	Page 45
<b>PART 12: THE PRIVACY STANDARDS .....</b>	<b>Page 46</b>
The CREA Privacy Principles Adopted by [AGENCY NAME].....	Page 46
Guiding Policy on Personal Data Collection .....	Page 46
Privacy Compliance and Oversight .....	Page 46
Gathering, Employment, and Dissemination of Personal Details .....	Page 47
Caveats on Data Usage for Novel Objectives .....	Page 47
PROTECTING INFORMATION.....	Page 47
Safeguarding Information.....	Page 47
Procedures for Collection and Disclosure .....	Page 47
Storing Data Safely: .....	Page 47
Proper Disposal and Destruction:.....	Page 48
Ensuring Transparent Access to Information .....	Page 48
Addressing Compliance Concerns.....	Page 48
<b>PART 13: NATIONAL DO NOT CALL LIST AND MARKETING RULES .....</b>	<b>Page 49</b>
Compliance Structure within [AGENCY NAME] .....	Page 49
Clarifications and Assistance.....	Page 49
Broad Overview of CRTC Rules .....	Page 49
Exemptions and Applicability of Telemarketing Rules.....	Page 50
Clarifying Telemarketing Terminologies.....	Page 50
DNCL Protocols to Heed.....	Page 50
Comprehensive Telemarketing Guidelines.....	Page 51
Initiating the Connection: Identification Imperatives .....	Page 51
Post-Call Provisions: Ensuring Consumer Access .....	Page 51
Transparent Channels for Correspondence .....	Page 51
Automatic Dialing-Announcing Device (ADAD) Regulations .....	Page 52
Legal Implications and E&O Insurance Insights .....	Page 52
<b>PART 14: OFFICE OPERATIONS.....</b>	<b>Page 54</b>
CONFLICT RESOLUTION IN [AGENCY NAME] .....	Page 54
THE ETHICAL GUIDELINE .....	Page 54
PRIVACY COMMITMENT AT [AGENCY NAME] .....	Page 54
PRIVACY CODE .....	Page 55
<b>PART 15: COVID-19 GUIDELINES .....</b>	<b>Page 56</b>
GENERAL GUIDELINES FOR SAFE PROPERTY VIEWING.....	Page 56
Minimizing Health Risks.....	Page 56

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---

Open Houses: A Reimagined Approach .....	Page 56
Adjustments in a New Reality .....	Page 56
Physical Distancing and Interaction Protocols .....	Page 56
Prioritizing Personal Space.....	Page 56
Property Preparation and Sanitation .....	Page 57
Ensuring Safe Environments .....	Page 57
Post-Showing Measures.....	Page 57
Consolidating Safety .....	Page 57
Follow-up Communication Protocols.....	Page 57
Ensuring Clarity and Transparency .....	Page 57
Recommendations for Agents and Property Owners.....	Page 58
Best Practices for Enhanced Safety.....	Page 58
Recommendations for Attendees .....	Page 58
Being Responsible and Mindful .....	Page 58

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# PART 1: INTRODUCTION

This manual provides essential guidelines for Realtors regarding the daily activities of the [AGENCY NAME]. While this document may not cover every conceivable scenario, it is crucial to consult the supervisory staff if you have any questions.

## WELCOME

Established in [REDACTED], [AGENCY NAME] exemplifies innovative marketing techniques. Simultaneously, it highlights a steadfast commitment to building a positive relationship with the adjacent community, and cultivating an amiable and vibrant work atmosphere is fundamental to its principles.

Key Attributes of [AGENCY NAME]:

[REDACTED]  
[REDACTED]  
[REDACTED]

## MISSION STATEMENT

[REDACTED]  
[REDACTED]  
[REDACTED]

### The Evolution of Real Estate in the 21st Century

During the early 2000s, the real estate landscape underwent a notable transformation, gravitating towards a distinct "customer service culture." Within this framework, [AGENCY NAME] emerges as a prime exemplar, satisfying the high expectations of both buyers and sellers.

### Pillars of [AGENCY NAME]'s Commitment

At the core of [AGENCY NAME] is a steadfast dedication underpinned by three fundamental virtues:

- i. [REDACTED]
- ii. [REDACTED]
- iii. [REDACTED]  
[REDACTED]



Every individual within [AGENCY NAME], regardless of their position, is expected to uphold this "service culture". It is essential to highlight that this focus on service goes beyond a mere aspirational concept; it's an actionable criterion. Any divergence from this standard is scrutinized rigorously.

### **Anticipations for Sales Professionals**

Within [AGENCY NAME], sales professionals are more than just participants; they are stakeholders. Consequently, they can expect:

- i. **Exemplary Services:** [REDACTED]  
[REDACTED]
- ii. **Sustainable Success:** [REDACTED]  
[REDACTED]
- iii. **Business Growth:** [REDACTED]  
[REDACTED]

## **THE REAL ESTATE BROKER'S ACT**

### **Accountability of [AGENCY NAME] under License Laws**

In light of the Real Estate License Law, [AGENCY NAME] [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

### **Key Statutes and Guidelines Realtors Must Grasp:**

*Protection of Personal Data:* The Privacy Code [REDACTED]  
[REDACTED] highlights a  
fundamental regulation. This act dictates that [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

### **Financial Oversight & Client Identification:**

The [REDACTED] [REDACTED] emerges under the auspices of the Proceeds of  
Crime (Money Laundering) and Terrorist Financing Act. [REDACTED]  
[REDACTED]

**Regulations Surrounding Consumer Outreach:**

The [REDACTED] functions as a critical resource in this context. When a consumer, including private sellers, opts to register their telephone number with the [REDACTED]

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

**Office Protocols Established by [AGENCY NAME]:**

The company has established a thorough set of office policies and procedures. [REDACTED]

[REDACTED]  
[REDACTED]  
[REDACTED]

**Clarification on Realtor Affiliation with [AGENCY NAME]:**

In their professional capacity associated with [REDACTED]

[REDACTED]  
Consequently, [REDACTED]  
[REDACTED]  
[REDACTED]

**REALTORS ARE NOT PARTNERS, JOINT VENTURES, OR EMPLOYEES OF THE “[AGENCY NAME]” AND HAVE NO AUTHORITY TO BIND THE BROKER OR COMPANY WITHOUT APPROVAL.**

**INDEPENDENT CONTRACTOR STATUS**

Within the framework of [AGENCY NAME], [REDACTED]

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

Owing to the designation of Realtors as independent contractors, administrative personnel within [AGENCY NAME] [REDACTED]

[REDACTED]

**OVERALL GOALS AND OBJECTIVES**

For marketing and management support, Realtors affiliated with [AGENCY NAME] are [REDACTED]

[REDACTED]

**PART 2: BROKER (COMPANY) RESPONSIBILITIES**

In overseeing submissions, listings, promotional materials, and the like, the Broker of [AGENCY NAME] offers guidance to agents, emphasizing the imperative of unwavering compliance with legal standards in their daily professional activities. [REDACTED]

[REDACTED]

Moreover, unless explicitly stipulated by [REDACTED]

[REDACTED]

# PART 3: OFFICE PROCEDURES

## GENERAL

### STANDARD BUSINESS TIMES

[AGENCY NAME] support staff are operational from [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

### RECOGNIZED PUBLIC HOLIDAYS

[AGENCY NAME] recognizes public holidays and keeps the office closed on these days. [REDACTED]  
[REDACTED]

**\*NEW YEAR'S DAY \*LOUIS RIEL DAY \*GOOD FRIDAY \*VICTORIA DAY  
\*CANADA DAY \*LABOUR DAY \*THANKSGIVING DAY \*REMEMBRANCE  
DAY \*CHRISTMAS DAY \*BOXING DAY  
\*THE LAW REQUIRES THAT A REALTOR NOT ENTER INTO CONTRACTS OR  
CONDUCT ANY BUSINESS ON REMEMBRANCE DAY.\***

### VACATION

It is crucial to recognize that Realtors operate as independent contractors and, therefore, do not receive vacation benefits. Given this independent status:

- i. [REDACTED]  
[REDACTED]
- ii. [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]
- iii. [REDACTED]  
[REDACTED]

### LEAVING THE OFFICE AFTER HOURS

Beyond standard operating hours, individuals departing the premises have particular responsibilities, especially when they are the final ones to leave. To specify:

- i. [REDACTED]
- ii. [REDACTED] [REDACTED] [REDACTED] [REDACTED]

iii. [REDACTED]

iv. [REDACTED]

[REDACTED]

### **PARKING**

Parking etiquette is not merely a courtesy but a requirement. Given the communal nature of parking resources:

i. [REDACTED]

[REDACTED]

ii. [REDACTED]

[REDACTED]

### **BOARD ROOM AND OFFICE USAGE**

[AGENCY NAME] provides access to [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

### **POSTAGE COSTS**

it is imperative to understand that the responsibility for postage expenses squarely falls on the Realtor.

### **COPY MACHINE**

i. **Monthly Allocation:** [REDACTED]

[REDACTED]

ii. **Overage Charges:** [REDACTED]

[REDACTED]

iii. **Colour Variance:** [REDACTED]

[REDACTED]

iv. **Non-business Replications:** [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

### **BUSINESS CARDS, BADGES, DESK PLATES**

**Official Designations and Titles:** Realtors are permitted to adopt certain designations, [REDACTED]

[REDACTED]  
[REDACTED]  
[REDACTED]

**Logo Integrity:** The [AGENCY NAME] logo must not be changed. [REDACTED]

[REDACTED]  
[REDACTED]

**CELL PHONE GUIDELINES:**

- i. [REDACTED]  
[REDACTED]
- ii. [REDACTED]  
[REDACTED]  
[REDACTED]
- iii. [REDACTED]  
[REDACTED]  
[REDACTED]
- iv. [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

**SMOKE-FREE ZONE:**

- i. [REDACTED]  
[REDACTED]
- ii. [REDACTED]  
[REDACTED]
- iii. [REDACTED]  
[REDACTED]  
[REDACTED]

**PROFESSIONAL ATTIRE:**

Although [AGENCY NAME] does not enforce a strict dress code, it is highly encouraged that individuals present themselves in a neat and appropriate manner, indicative of solid business decorum.

## AWARDS AND CONTESTS

For any inquiries concerning awards and contests, kindly approach the manager.

## STAFF ROLES AT THE OFFICE

[AGENCY NAME] boasts a competent workforce dedicated to serving diverse needs:

[REDACTED]

*Position:* Front Desk Receptionist & Agent Services

*Responsibilities:*

- i. [REDACTED]
- ii. [REDACTED]
- iii. [REDACTED]  
[REDACTED]

[REDACTED]

*Position:* Office Controller/Accountant

*Responsibilities:*

- i. [REDACTED]  
[REDACTED]

[REDACTED]

*Position:* Conveyancing

*Responsibilities:*

- i. [REDACTED] [REDACTED] [REDACTED] [REDACTED]
- ii. [REDACTED] [REDACTED] [REDACTED] [REDACTED].

## MEMBERSHIP CRITERIA

Individuals aspiring to serve as salespersons under the banner of [AGENCY NAME] must adhere to the subsequent prerequisites:

- i. [REDACTED]  
[REDACTED]
- ii. [REDACTED]
- iii. [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

## **BUSINESS PRACTICES**

### **OFFICE RECORDS**

All contractual documents, such as purchase offers and listing contracts, should be [REDACTED]

### **FUND HANDLING RELATED TO PURCHASE PROPOSALS**

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

### **FEES ASSOCIATED WITH MULTIPLE LISTING SERVICE (MLS)**

Real estate agents have to settle the fees related to the Multiple Listing Service. [REDACTED]

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

### **CORPORATE MEETINGS**

[AGENCY NAME] arranges a corporate meeting [REDACTED]

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

[REDACTED] Consistent attendance in these sessions underscores a commitment to individual growth in the real estate domain and fostering a robust, cohesive unit.



**OTHER MEETINGS OFFERED BY THE [REDACTED] BOARD**  
[AGENCY NAME] often recommends that its agents consider attending the valuable workshops and events [REDACTED]  
[REDACTED]  
[REDACTED]

**KEYS**

Whenever a vendor hands over keys to an agent, the agent must safeguard them carefully. [REDACTED]  
[REDACTED]

**LOCK BOX LOCATION**

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

**LOCK BOX NOTIFICATIONS**

Realtors need to [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

**ACTIVITY RECORDS**

Each [AGENCY NAME] office must maintain an "activity board." [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

**GENERAL WORK CONTRACTS**

To officially represent [AGENCY NAME], Realtors are required to agree to and sign the independent contractor agreement. [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

[REDACTED] Thoroughly reading and committing to the terms laid out in the Realtor's handbook is also a prerequisite for representation under the [AGENCY NAME] banner.

**STAYING CONNECTED WITH THE OFFICE**

Maintaining consistent communication with the office is paramount for Realtors. [REDACTED]

The Sentry lockbox [REDACTED]

It is vital for Realtors to meticulously document client interactions [REDACTED]

In the event a Realtor assesses a location as potentially hazardous, [REDACTED]

**[AGENCY NAME] emphatically disapproves of the resort to aggressive defense tools like blades or pepper sprays.**

### **PROTOCOLS FOR REALTORS IN PROPERTY TRANSACTIONS**

Realtors play a pivotal role as intermediaries in property dealings. [REDACTED]

[REDACTED] Ensuring transparent and honest practices is fundamental, [REDACTED]

### **PROTOCOLS FOR REALTORS ENGAGING IN PERSONAL TRANSACTIONS:**

Realtors are obligated to disclose when they or their marital partners engage in property buying or selling. [REDACTED]

- i. [REDACTED]
- ii. [REDACTED]
- iii. [REDACTED]
- iv. [REDACTED]
- v. [REDACTED]

**ROLE OF ASSISTANTS IN REAL ESTATE:**

A real estate assistant serves to support licensed realtors throughout particular transactional phases. Individuals licensed pursuant to the Real Estate Brokers Act are recognized as salespersons. [REDACTED]

[REDACTED]

**ASSISTANTS WITHOUT REGISTRATION**

Those not officially registered pursuant to the Real Estate Brokers Act are

[REDACTED]

It is imperative for brokers and licensed salespersons to recognize that any transgressions or oversights committed by unregistered assistants squarely reside within their jurisdiction. [REDACTED]

[REDACTED]

[Redacted text block]

Tasks permissible for unregistered assistants encompass:

- i. [Redacted]
- ii. [Redacted]
- iii. [Redacted]
- iv. [Redacted]
- v. [Redacted]
- vi. [Redacted]
- vii. [Redacted]
- viii. [Redacted]
- ix. [Redacted]
- x. [Redacted]
- xi. [Redacted]
- xii. [Redacted]
- xiii. [Redacted]
- xiv. [Redacted]

However, unregistered assistants are strictly prohibited from:

- i. [Redacted]
- ii. [Redacted]
- iii. [Redacted]
- iv. [Redacted]
- v. [Redacted]

- vi. [REDACTED]
- vii. [REDACTED]
- viii. [REDACTED]

**HANDLING REFERRAL OF EXPERTS**

[AGENCY NAME] members frequently field inquiries regarding recommendations for various professionals, such as lawyers, engineers, architects, and contractors. When presented with such queries, it is not uncommon for real estate agents to suggest a professional or contractor based on their past interactions. [REDACTED]

[REDACTED]

In instances where a buyer makes a successful claim of negligent misrepresentation against an agent, they must prove a sequence of elements: [REDACTED]

[REDACTED]

Negligently suggesting the services of a professional or contractor who later provides subpar services only increases the likelihood of damages.

[REDACTED]

For agents who are still determining the proficiency or capabilities of a specific professional, [REDACTED]

[REDACTED]

Lastly, a prudent suggestion is for agents to offer multiple professional referrals for a particular task, allowing the client or homeowner to evaluate and choose what's best for them thoroughly.

### **DUAL REPRESENTATION IN REAL ESTATE TRANSACTIONS (WORKING AS THE BUYING & SELLING AGENT)**

Navigating the role of a dual agent, representing both the buyer and seller, is an intricate responsibility assumed by some salespersons. In such scenarios, safeguarding the confidentiality of each party's proprietary information is of paramount importance. [REDACTED]

[REDACTED]

### **The Significance of Time Clauses**

A salient feature in real estate contracts is the inclusion of a time clause, especially when an offer hinges on the sale of a different property.

[REDACTED]

### **Salesperson's Accountability in Time-bound Offers**

The responsibility falls squarely on the shoulders of the salesperson to ensure the viability of such time-sensitive offers. [REDACTED]

[REDACTED]

### **Upholding Professional Integrity**

To maintain the trust of all stakeholders, the salesperson must only prolong the transaction if necessary. [REDACTED]

[REDACTED]

## **PART 4: ADVERTISING AND PROMOTION**

### **GENERAL POLICY FOR [AGENCY NAME] AGENTS**

Every [AGENCY NAME] agent is encouraged to adopt a consistent and professional approach towards their business conduct. [REDACTED]

[REDACTED]

### **SIGNAGE: A KEY MARKETING TOOL**

Signage, accompanied by social media, proves to be a potent and cost-effective strategy for generating client inquiries. [REDACTED]

[REDACTED]

[REDACTED] Adhering to specific guidelines can enhance the overall effectiveness of these signs:

- i. [REDACTED]

- ii. [REDACTED]
- iii. [REDACTED]
- iv. [REDACTED]
- v. [REDACTED]
- vi. [REDACTED]

### **LEVERAGING SOCIAL MEDIA FOR PROMOTION**

The digital era offers a range of social media platforms, including Facebook, Instagram, and Twitter, as cost-effective channels for self-promotion by agents. However, certain things can not be compromised.

Advertisements on these platforms must [REDACTED]

### **CLIENT-CENTRIC ADVERTISING**

A fundamental and non-negotiable rule in advertising is as follows:

## **PART 5: PROSPECTS/LISTINGS**

### **PROTOCOLS WHEN A PROSPECT SEEKS A SALESPERSON**

In the context of [AGENCY NAME]'s organizational structure, it is imperative that any prospective individual seeking information about a salesperson receives prompt attention. [REDACTED]



[REDACTED]

**NAVIGATING DUPLICATE INTERACTIONS WITH PROSPECTS**

Situations may unfold wherein multiple salespersons inadvertently attend to the same prospect, potentially presenting identical properties. In such cases, [REDACTED]

[REDACTED]

**CRITERIA FOR PROSPECT MANAGEMENT AND WITHDRAWAL**

[AGENCY NAME] retains the authority to reallocate prospects from a specific salesperson in certain circumstances. This intervention becomes requisite when [REDACTED]

[REDACTED]

**OBLIGATIONS OF THE LISTING SALESPERSON**

A listing salesperson bears multiple responsibilities, with one of the foremost being the precision of documentation, encompassing:

**ESTIMATE OF SELLER CHARGES**

**LISTING CONTRACT**

- i. [REDACTED]
- ii. [REDACTED]
- iii. [REDACTED]
- iv. [REDACTED]

v. [REDACTED]

### **LISTING INFORMATION SHEET**

Salespeople are cautioned against entering unverified information. [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

In terms of modifications, any alterations to crucial listing information, like price adjustments, must be documented and endorsed by the vendor without delay.

### **Keeping Vendors Updated on Market Conditions and Strategies**

The responsibility of thoroughly preparing sellers for potential offers on their property lies with the agent. This entails the presentation of market trends and comparative sales data, as well as providing regular updates to the seller regarding ongoing market activity. [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

### **Navigating Multiple Offers and Offer Presentations**

When multiple offers arise for a single property, a simultaneous presentation to the vendor(s) becomes obligatory. [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

### **Communication Standards and Acceptance Policies**

[AGENCY NAME] is stringent against accepting verbal or telephonic agreements, emphasizing the potential for misunderstandings. However, exceptions can be made under specific circumstances. [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

[REDACTED]

**Counter Offers, Deposits, and Sale Reporting**

Counter offers, when made, should prioritize clarity and brevity. [REDACTED]

[REDACTED]

[REDACTED] This should be regardless of the nature of the deal, be it conditional or firm. Essential documents like trade record sheets and offers to purchase, complemented by the listing printout, should be [REDACTED]

[REDACTED]

**WITHDRAWN OR TRANSFERRED LISTINGS**

Navigating the complexities of the real estate industry is a substantial endeavor, exemplified by the intricate procedures related to withdrawn or transferred listings. [REDACTED]

[REDACTED] At [AGENCY NAME], in the event a seller contemplates making any such alterations, [REDACTED]

[REDACTED] There exists a particular rhythm and symmetry in this process, where each action within the listing protocol necessitates an equivalent and weighty reaction.

**CANCELLATION OF SALE**

The sale of a property is more than just an agreement; it is a binding commitment, a contract that holds both parties accountable. Thus, the cancellation of such a contract is not a light affair. [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

This is not just a matter of procedure; it is about respecting the agreement's integrity. Following this revelation, it becomes the salesperson's duty [REDACTED]

[REDACTED]

## **PART 6: [AGENCY NAME]'s OPEN HOUSE GUIDELINES**

### **OPEN HOUSE SCHEDULING PROTOCOLS**

[AGENCY NAME] emphasizes the benefits of open houses, recognizing these events' profound impact in fostering essential face-to-face interactions. [REDACTED]

[REDACTED]

[REDACTED] Furthermore, meticulous planning dictates that the promotion of an open house should commence at least three days prior.

### **ADVERTISING CONSIDERATIONS FOR OPEN HOUSES**

After establishing a firm date and time for the open house, it is incumbent upon the salesperson to pursue the advertising pathway. [REDACTED]

[REDACTED]

### **SIGNAGE PREPARATIONS AND COMPLIANCE**

[REDACTED]

[REDACTED] Any ambiguities surrounding these regulations should immediately precipitate a consultation with the management, ensuring alignment with community standards.

## PROTOCOLS FOR UNATTENDED OPEN HOUSES

Leaving an open house unattended starkly contrasts [AGENCY NAME]'s commitment to providing consistent, on-ground representation. [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

## PART 7: DOCUMENTATION

### RETENTION OF RECORDS

The realm of real estate, especially when delving into the intricacies of brokerage, emphasizes the paramount importance of meticulous record-keeping. [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

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