

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