

## **Tropical Realty Referrals**

### Instructions/Checklist for Submitting Application

Return these forms:

\_\_\_\_\_ **Tropical Realty Referrals, Inc. Independent Contractor Agreement:** Read, fill out the top of page 1 and sign at the bottom of page 5.

\_\_\_\_\_ **Exhibit “A” Tropical Realty Referrals, Inc. Procedures For Handling Referrals:** Read, select Commission Plan and sign at the bottom of page 3.

\_\_\_\_\_ **Associate Information:** Fill out completely.

\_\_\_\_\_ **DBPR RE-2050:** Fill out the Associate Information Box and sign at the bottom.

\_\_\_\_\_ **W-9:** Fill out and sign.

Also, Include:

\_\_\_\_\_ **Copy of Your Current Real Estate License.**

\_\_\_\_\_ **Copy of Your Current Continued Education Certificate.** (May not be required for new agents)

\_\_\_\_\_ **Check For The Annual Fee** as per schedule in Exhibit “A”.  
(You must follow the schedule for **Prorating the Annual Fee**)

**Make check payable to: Tropical Realty Referrals, Inc.**

Note:

- All forms must be complete and signed before activation with the State of Florida.
- Please do not return a partial list of forms.
- **Please do not return any forms without a Copy of Your Current Real License and a Copy of Your Current Continued Education Certificate. Your file cannot be processed without them.**

Larry C. Stockton  
*Broker*  
Tropical Realty Referrals, Inc.  
9108 U.S. Highway 19, 2nd Floor  
Port Richey, FL 34668  
Office: (727) 849-9400 Ext.: 309  
Fax: (727) 841-7509  
[lstockton@prutropical.net](mailto:lstockton@prutropical.net)

**TROPICAL REALTY REFERRALS, INC.  
INDEPENDENT CONTRACTOR AGREEMENT**

**AGREEMENT** made this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ between **TROPICAL REALTY REFERRALS, INC.** (the "Company"), a Florida corporation, organized and existing under the laws of the State of Florida and

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("Independent Contractor"), residing at \_\_\_\_\_

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**WITNESSETH:**

**WHEREAS**, the Company is duly licensed as a real estate broker or salesperson in the State of Florida and enjoys a good reputation for fair and honest dealing with the public; and

**WHEREAS**, Independent Contractor desires to engage in the business of procuring and furnishing buyers and sellers of real estate to licensed brokers activity engaged in the business of listing and selling real estate; and

**WHEREAS**, Independent Contractor wishes the benefit of an affiliation with the Company in connection with the conduct by Independent Contractor of its referral business; and

**WHEREAS**, it is believed to be to the mutual advantage of the Company and the Independent Contractor to enter into this Agreement;

**NOW, THEREFORE**, in consideration of the premises and the mutual covenants herein contained, the parties hereto agree as follows:

1. The Company and the Independent Contractor agree to affiliate with one another for the limited purpose of permitting Independent Contractor to refer to the Company prospective sellers and buyers of real estate.

2. Independent Contractor agrees that Independent Contractor will not list any real estate for sale, exchange, lease or rental nor represent prospective sellers in the sale of their real estate or prospective buyers in the purchase of real estate.

3. Independent Contractor agrees to refer all prospective clients, customers, buyers and sellers of which Independent Contractor becomes aware to the Company in accordance with the procedures prescribed by the Company and described in Exhibit "A" attached hereto (the "Procedures"). The Company specifically reserves the right to adopt new procedures and amend any existing procedures from time to time during the term of this Agreement.

Independent Contractor shall not be compensated for the referral of any prospective seller or buyer if the Company determines that such seller or buyer has been previously referred to the Company by another referral associate of the Company or any other source. In the

event such determination is made, the Company will promptly notify Independent Contractor thereof.

It is specifically understood and agreed by Independent Contractor that the Company shall have the exclusive, absolute and unconditional right to select the active broker to whom any prospective seller or buyer is to be referred. Independent Contractor further understands and agrees that the Company and the Company alone will make the referral of all prospective sellers or buyers to an active broker selected by it. In no event shall Independent Contractor refer a prospect directly to an active broker whether such active broker has been selected or designated for prior referrals by the Company. All contact with active brokers shall be made through the Company.

4. Independent Contractor agrees that so long as this Agreement is in force and in effect the Independent Contractor will not refer any prospective seller or buyer to another real estate broker for representation. Nothing herein contained shall preclude Independent Contractor from selling or purchasing real property for the Independent Contractor's own account provided that no real estate brokerage commission or fee is paid or received by the Independent Contractor in connection with such transaction unless such commission or fee is the result of a referral by the Independent Contractor to the Company pursuant to this Agreement, and provided further that the Independent Contractor must in any such sale or purchase notify the party to such transaction that the Independent Contractor is licensed as a real estate salesperson.

5. Independent Contractor agrees not to create or impose any liability, actual or otherwise, upon the Company or any of its related entities, or persons employed by it or affiliated therewith.

6. Independent Contractor represents that he or she is duly licensed as a real estate broker or salesperson under the laws of the state in which the Company is located. Independent Contractor shall transfer such real estate license to the Company for the term of this Agreement. During the term of this Agreement, Independent Contractor shall, at Independent Contractor's own expense, maintain in good standing such real estate license.

7. Independent Contractor agrees to comply in all respects with all applicable laws, rules and regulations relating to the engaging by the Independent Contractor in real estate referral activities, including without limitation, the real estate licensing laws of the state in which the Company operates, and to conduct Independent Contractor's real estate referral activity in accordance with this Agreement and the policies of the Company.

8. Independent Contractor agrees to conform to and abide by all Codes of Ethics that are binding on or applicable to real estate brokers and salespersons operating in the state in which the Company is located.

9. Independent Contractor agrees to act, and to represent that he or she is acting solely as a referral associate of the Company and not as an active real estate broker or salesperson with any other firm, whether or not related to the Company.

10. The Company agrees to maintain a system of personnel and materials sufficient for processing Independent Contractor's referrals of prospective buyers and sellers in accordance with the Procedures.

11. Independent Contractor's compensation hereunder shall be limited to commissions earned with respect to referrals made by Independent Contractor to Company. No commission shall be deemed to be earned by the Independent Contractor until such time as the title to the property sold or purchased by Independent Contractor's referred prospect passes from the seller to the buyer and a real estate commission or fee for such referral is received by the Company. The amount of the referral fee to be paid for each referral the Independent Contractor shall be as established by the Company and set forth in the Procedures. The Company reserves the right to unilaterally change from time to time during the terms of this Agreement the amount of the referral fee, provided that the amount of the referral fee in effect at the time of closing of a particular real estate transaction shall be utilized in computing the referral fee earned by Independent Contractor.

Independent Contractor will not be treated as an employee with respect to the services provided pursuant to this Agreement for Federal tax purposes. Independent Contractor shall be paid the gross amount of referral fees due, without withholding for Federal, State or local income taxes unless the Company is required by applicable law to withhold. The Company shall not be responsible for the payment of any FICA, FUTA or other similar charges with respect to Independent Contractor and Independent Contractor agrees to pay self-employment and other taxes, including income taxes and estimates thereof, as required by the Internal Revenue Code of 1954, as amended, and the laws, rules and regulations of any other governmental entity having jurisdiction over Independent Contractor.

Referral fees, determined and computed as set forth above, shall be the sole compensation payable by the Company to Independent Contractor hereunder. Independent Contractor shall not receive any draw or advance against future referral fees nor shall Independent Contractor be paid any salary or wage or be reimbursed any expenses incurred by Independent Contractor in the performance of Independent Contractor's services hereunder. Payment of referral fees from the Company to Independent Contractor shall take place as soon as practicable after receipt of the referral fee by the Company from the active broker.

12. The Company in its sole discretion shall determine (i) whether or not a claim is to be made or a lawsuit filed against an active broker for referral fees, and (ii) the time, manner and in whose name any such claim or lawsuit is to be filed, negotiated, maintained, settled or compromised and (iii) terms and conditions of settlement or compromise of any such claim or lawsuit. Costs and expenses, including attorney's fees, incurred by the Company in connection with any claim or lawsuit to receive referral fees, whether a successful result is achieved or not, shall be paid when due by the Company and Independent Contractor in the same proportion as the referral fee being sought would have been divided between the Company and the Independent Contractor absent the dispute.

Likewise, the net proceeds of any judgment recovered or of any negotiated settlement of a claim or lawsuit shall, when collected, be divided between the Company and Independent Contractor in such proportion.

13. Independent Contractor shall determine his or her own hours of work. Independent Contractor is not required to work any number of hours per week.

14. Independent Contractor shall pay any and all expenses incurred by Independent Contractor in connection with the referral of any prospective buyer or seller to the Company including, without limitation, expenses of transportation, gasoline, automobile, telephone, business cards and entertainment. The Company shall not be obligated to furnish or make available to Independent Contractor any office or other facilities or clerical services of the Company. Any such office or other facilities or clerical services required or deemed desirable by Independent Contractor to perform the services and responsibilities hereunder shall be the sole responsibility of Independent Contractor.

15. The Company shall not be liable to Independent Contractor for any expenses incurred by him or her for any of his or her acts, nor expenses in discharging its obligations hereunder. Independent Contractor shall have no authority to bind the Company by an act, promise or representation.

16. Independent Contractor shall at all times during the term of this Agreement be deemed to be an "Independent Contractor", and not a servant, employee, partner or joint adventurer of the Company.

17. Independent Contractor shall not, after termination of this Agreement, use to his or her own advantage, or the advantage of any other person or corporation, any information gained for or from the files or business of the Company. Upon termination, Independent Contractor agrees not to disclose nor furnish any person or entity any information concerning the Company's clients, customers, properties, prices, policies or relationships nor remove any item belonging to or associated with the Company as the same are solely a period of (6) six months after termination of this Agreement and affiliation, Independent Contractor will not directly or indirectly solicit or otherwise attempt in any manner to induce any referral associate of the Company to terminate his or her affiliation with the Company.

18. If either party hereof shall default or breach any part of this Agreement which default or breach results in a loss or damage to the other party, the defaulting party hereby agrees to pay to the other party all loss or damage including legal fees and further agrees to hold the other party harmless from any claim, demand, cause of action or lawsuit which may result from or be caused by such wrongdoing. Independent Contractor further agrees to indemnify and hold the Company harmless from any claims, demands or judgments, including legal fees and costs incurred in investigating and defending such claims, demands or judgments arising out of this Agreement and Independent Contractor's services as an Independent Contractor.

19. This Agreement and affiliation hereby may be terminated:

a. By either party at any time upon reasonable written notice given to the other party; or

b. By the Company immediately upon delivery of notice to Independent Contractor that Independent Contractor has failed to comply with any of the terms or conditions of this Agreement.

In the event of such termination, the rights of the parties to any referral fees which accrued prior to the date of termination shall not be affected by reason of such termination. The obligations of the parties hereto shall survive termination of this Agreement.

20. This Agreement is personal to the Independent Contractor and neither the Agreement for any of the rights or duties hereunder may be transferred, assigned, mortgaged or otherwise encumbered by Independent Contractor, by operation of law or otherwise.

21. This Agreement and Exhibit "A", together with the policies and procedures referred to herein, represents the entire Agreement between the Company and Independent Contractor. This Agreement may not be changed orally but only in writing executed by both parties hereto. This Agreement shall be governed by and construed in accordance with the laws of the State in which the Company is located.

**IN WITNESS WHEREFORE**, the parties hereto have hereunto set their hands and seals as of the day and year first above.

**TROPICAL REALTY REFERRALS**  
a Florida Corporation

By: \_\_\_\_\_  
Larry C. Stockton  
Broker

\_\_\_\_\_  
Independent Contractor

## EXHIBIT "A"

### TROPICAL REALTY REFERRALS, INC. PROCEDURES FOR HANDLING REFERRALS

#### 1. Procedures.

- 1.1 A Referral Associate having a lead should mail, e-mail or fax the Company to relay information on the identity, location, telephone number and any other relevant information about the prospective buyer or seller. The person at the Company to contact is:

Cheryl O'Shields  
9108 U.S. 19, 2<sup>nd</sup> Floor  
Port Richey, FL 34668  
[coshields@prutropical.net](mailto:coshields@prutropical.net)  
Fax: (727) 841-7509  
Office: (813) 712-3846

- 1.2 The Company will then:
- a. Acknowledge receipt of the referral;
  - b. Refer the referral to an active licensed real estate broker giving all information then available with respect to the referral;
  - c. Send the Referral Associate either (i) a written confirmation of the referral to a real estate broker or (ii) a statement of the reasons for a rejection of the referral. Referrals may be rejected because the real estate broker to whom the referral was made already had a direct relationship with the referred party, a prior referral of the party has been made, or any other reason determined by the Company.

1.3 Once confirmation of the referral is sent, the Company will keep Referral Associate informed of the progress of the transaction. The Company will periodically contact the respective real estate broker for information and status reports until the referral results in a listing or is discontinued, which may be at any time in the sole discretion of the real estate broker to whom the referral is made.

1.4 If a listing is obtained or a contract executed within 18 months after the referral has been accepted, and a commission is subsequently earned with respect to the transaction referred, the Referral Associate will be entitled to receive a referral fee. Beyond this period, there is no prospect protection. If, for any reason whatsoever, a transaction is not consummated or the Company does not receive a fee, the Referral Associate shall not be entitled to a fee. If the real estate broker elects to discontinue its efforts with respect to any referred party, it shall be free to do so and the Referral Associate shall be notified of such a decision. All determinations with respect to fee entitlements shall be made by the Company in its sole discretion.

1.5 Once a transaction is consummated and the real estate broker pays the stipulated referral fee to the Company, the Company will issue a check to the Referral Associate for the Referral Associate's portion of the fee earned.

## 2. Amount of Referral Fees.

2.1 Referral fees will be based on 25% of the gross listing commission for a listing lead or 25% of the gross selling commission for a buyer lead. Gross commission means commissions received by the real estate broker after deduction of all expenses or reductions paid or agreed to by the real estate broker in order to consummate the real estate transaction. All fees are considered earned upon the closing of the transaction and receipt of the referral fee by the Company. Fees will be paid to the Referral Associate as soon as possible thereafter.

2.2 If a Referral Associate purchases or sells a property and the Company receives a fee with respect to such transaction, he or she will receive the customary referral commission of either the listing or the sales portion of the referral commission paid.

## 3. Commission Schedule

3.1 Referral Associate must decide on one of two options with respect to how the collected referral commissions will be split between the Referral Associate and the Company. The Referral Associate agrees to the Commission Split Option as selected below. **Referral Associate Must Select Plan A or Plan B here.**

Plan A     60% to Referral Associate - \$25 Annual Fee

OR

Plan B     80% to Referral Associate - \$225 Annual Fee

**Check Plan A or Plan B Above.**

3.2 The Commission Split Option selected herein will apply until the Company receives written notice from the Referral Associate to switch plans. The plan can only be changed at the Due Date of the Annual Fee. There are no refunds should Associate leave the Company before the next renewal date.

3.3 The Due Date for the Annual Fee is the end of the Referral Associate's license renewal month. If a license renewal date is March 31, then the Due Date for the Annual Fee is March 31 each year. If a license renewal date is September 30, then the Due Date for the Annual Fee is September 30 each year.

3.4 The Annual Fee for new Referral Associates will be pro-rated to their next Due Date. The schedule will be as follows:

<b>Plan A</b>	<b>Today's Date:</b>	
March Renewal Date:	April 1 – June 30	\$25
	July 1 – September 30	\$18.75
	October 1 – December 31	\$12.50
	January 1 – March 31	\$6.25
September Renewal Date:	October 1 – December 31	\$25
	January 1 – March 31	\$18.75
	April 1 – June 30	\$12.50
	July 1 – September 30	\$6.25
<b>Plan B</b>	<b>Today's Date:</b>	
March Renewal Date:	April 1 – June 30	\$225
	July 1 – September 30	\$168.75
	October 1 – December 31	\$112.50
	January 1 – March 31	\$56.25
September Renewal Date:	October 1 – December 31	\$225
	January 1 – March 31	\$168.75
	April 1 – June 30	\$112.50
	July 1 – September 30	\$56.25

Make Checks Payable to: **Tropical Realty Referrals, Inc.**

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Independent Contractor's Signature

## Associate Information

Name: \_\_\_\_\_

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Bus Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Social Security #: \_\_\_\_\_

Real Estate License #: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Source: (How did you hear about us?) \_\_\_\_\_

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**50 Business Cards** are available at no charge. A sample is shown. This is the only allowable Business Card. Please indicate whether you want the cards. If you chose to get them, they will be mailed to you.

\_\_\_\_\_ Please send the Free Business Cards

OR

\_\_\_\_\_ Please do not the send Free Business Cards

Name on Business Card: \_\_\_\_\_

Phone # on Business Card: \_\_\_\_\_

E-mail on Business Card: \_\_\_\_\_

Sample Business Card

<p><b>John Doe</b> Licensed Real Estate Salesperson (727) 937-1234 johndoe@yahoo.com</p> <hr/> <p><b>Tropical Realty Referrals, Inc.</b> 9108 U.S. Highway 19, 2nd Floor Port Richey, FL 34668</p>
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**DBPR RE-2050 – Request for Change of Status**

**STATE OF FLORIDA**  
**DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION**  
1940 North Monroe Street  
Tallahassee, FL 32399-0783  
Customer Contact Center: 850.487.1395  
FAX: 850.488.8040  
[www.myfloridalicense.com/dbpr](http://www.myfloridalicense.com/dbpr)

CHECK ACTION(S) REQUESTED	
<b>Transaction Type:</b>	
<input checked="" type="checkbox"/>	Become Active – no charge
<input type="checkbox"/>	Become Inactive – no charge
<input type="checkbox"/>	Add/Delete Trade Name – no charge
<input type="checkbox"/>	Become Sole Proprietor – no charge (Forms 2050 & 0080 required)
<input type="checkbox"/>	Change Broker/Owner Employer – no charge
<input type="checkbox"/>	Terminate Employee – no charge
<input type="checkbox"/>	Add/Delete PA or LLC - \$30.00 fee required – see F.S. 475.161
<input type="checkbox"/>	Request for Multiple License - \$95.00
<input type="checkbox"/>	Renew license
<input type="checkbox"/>	Qualifying Broker (CQ package required)
<input type="checkbox"/>	Owner/Developer (Forms 2050 & 0080 required)

ASSOCIATE INFORMATION	
License Number	Licensee Name
Contact Information (telephone number or E-Mail address)	

BROKER OR ORGANIZATION INFORMATION	
Broker License Number	Organization License Number CQ 0268316
Broker/Owner Name	
Organization Name Tropical Realty Referrals, Inc.	
Trade Name (if applicable)	Contact Info. (telephone number or E-Mail address) (727) 849-9400
Are you now or with the issuance of this license, an officer, director, member, or partner of any corporation, partnership, or L.L.C. which acts as a broker? Yes <input type="checkbox"/> No <input type="checkbox"/>	
If yes, please list name of entity Prudential Tropical Realty/Tropical Realty & Investments, Inc.	

ATTEST STATEMENT	
<b>REQUIRES SIGNATURE OF BROKER AND ASSOCIATE*</b> <b>(Except for Add/Delete PA or LLC – which may be signed by the licensee)</b>	
<b>I affirm that I have provided the above information completely and truthfully to the best of my knowledge.</b>	
Broker/Owner Sign Here: _____	Date: _____
*Broker signature not req. for Assoc. inactive status or add/delete PA –LLC	
Print Broker/Owner Name: Larry C. Stockton	
Associate Sign Here: _____	Date: _____
*All Associate requested changes require signature	

## 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, if different from above	
	Check appropriate box: <input type="checkbox"/> Individual/Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ ..... <input type="checkbox"/> Exempt payee <input type="checkbox"/> Other (see instructions) ▶	
	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 Line 1 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.

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

Social security number ..... ..... .....
OR
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.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
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### 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.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,

**Tropical Realty Referrals, Inc.**

9108 US Highway 19, 2<sup>nd</sup> Floor  
Port Richey, FL 34668

# Outgoing Referral

Send to: **Cheryl O'Shields**  
E-mail: coshields@prutropical.net  
Fax: (727) 841-7509  
Phone: (813) 712-3846

Date: \_\_\_\_\_

Originating Agent: \_\_\_\_\_

Office: \_\_\_\_\_

Phone #: \_\_\_\_\_

Requested Agent to be Assigned: \_\_\_\_\_

Requested Office to be Assigned: \_\_\_\_\_

Phone #: \_\_\_\_\_

Contact Referring Agent:  Yes  No

Buyer  Seller

**Customer Name(s):** \_\_\_\_\_

Address: \_\_\_\_\_

Work Phone: (\_\_\_\_) \_\_\_\_\_ Home Phone: (\_\_\_\_) \_\_\_\_\_

Customer knows about referral:  Yes  No Best Contact Time: \_\_\_\_\_

Mortgage Assistance:  Yes  No

Reason For Move: \_\_\_\_\_

Children: \_\_\_\_\_ Ages: \_\_\_\_\_ Transfer Date: \_\_\_\_\_

Area(s) Requested: \_\_\_\_\_

Relocation Package:  Yes  No Preferred Features: \_\_\_\_\_

Price Range: \$ \_\_\_\_\_ Bedrooms: \_\_\_\_\_ Baths: \_\_\_\_\_

Garage Size: \_\_\_\_\_ Lot Size: \_\_\_\_\_

Employer Location: \_\_\_\_\_

Existing Home Status: \_\_\_\_\_

Is there a specific time frame they are looking to move? : \_\_\_\_\_

✓ *Referral Fee will be 25% of the Gross Commission Income on the referred side.*

Referral Acknowledgement and Acceptance Confirmation.

\_\_\_\_\_  
**Originating Agent Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Receiving Agent Signature**

\_\_\_\_\_  
**Date**