

**AGENT PROFILE AND PREFERENCES**

Agent Name: **Click here to enter text.**

Company Name: **Click here to enter text.**

Cell Phone Number: **Click here to enter text.**

Email Address: **Click here to enter text.**

TREC License #: **Click here to enter text.**

Agent Birthday: **Click here to enter text.**

Team Name: **Click here to enter text.**

Team Assistant Name: **Click here to enter text.**

Team Assistant Contact Info: **Click here to enter text.**

Brokerage Electronic System Link to Login: **Click here to enter text.**

Brokerage Electronic System Used: **Click here to enter text.**

Brokerage Electronic System Username: **Click here to enter text.**

Brokerage Electronic System Password: **Click here to enter text.**

Docusign/DotLoop Login: **Click here to enter text.**

Docusign/DotLoop Password: **Click here to enter text.**

If needed, is there an agent who assists you if you cannot be reached or should we defer to the Broker? **Click here to enter text.**

Preferred Vendors in order by Choice:

Stager Name and Contact Info: **Click here to enter text.**

Photographer Name and Contact Info: **Click here to enter text.**

Sign Installation Company Name and Contact: **Click here to enter text.**

#1 Title Company and Escrow Officer: **Click here to enter text.**

#2 Title Company and Escrow Officer: **Click here to enter text.**

#3 Title Company and Escrow Officer: **Click here to enter text.**

#1 Home Inspector Name and Contact: **Click here to enter text.**

#2 Home Inspector Name and Contact: **Click here to enter text.**

#3 Home Inspector Name and Contact: **Click here to enter text.**

#1 Lender Contact Info: **Click here to enter text.**

#2 Lender Contact Info: **Click here to enter text.**

#3 Lender Contact Info: **Click here to enter text.**

#1 Home Warranty Company: **Click here to enter text.**

#2 Home Warranty Company: **Click here to enter text.**

#3 Home Warranty Company: **Click here to enter text.**

Handyman Contact Info: **Click here to enter text.**

House Cleaner Contact Info: **Click here to enter text.**

Any additional information, contacts, preferences, or expectations: **Click here to enter text.**

\*You do not need to provide your MLS access information. We will send you an HAR MLS Required Authorization form to receive an HAR login for access to your listings, etc. This will need to be signed by your Broker as well to stay within HAR MLS guidelines for user access.

Customer Relationship Manager (CRM) System Website Address: **Click here to enter text.**

Info needed only if Agent has a CRM they use other than the Brokerage CRM program.

Personal CRM Login: **Click here to enter text.**

Personal CRM Password: **Click here to enter text.**

Authorize “TransAct Management Solutions” to have administrative access to your Facebook business page to post listings, videos, and other listing, just sold marketing:

Please see our Privacy Statement in our contract agreement to see how we protect your information.

**Please return via email to** [**admin@transact2close.com**](mailto:admin@transact2close.com)