

THE HTG REFERRAL Program

HighTech Global



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The HTG Referral Program

A guide for agents and referral partners.

A Step by Step process.

Presented by:



HighTech Global

Powered By: eXp Commercial

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Introduction

At HighTech Global, we're more than just a commercial real estate firm—we're your trusted partner. With years of experience, a proven track record, and a client-centric approach, we're committed to delivering results that exceed expectations. Whether your client is looking to acquire, sell, develop, or convert commercial properties, our team provides the expertise and guidance needed for a successful outcome. Regardless of how familiar you are with the complexities of commercial real estate transactions or in the case you are not registered to do business in Florida, our HTG Referral Program offers a seamless way for you to connect your clients with our expert team while earning referral income.

Clearly put....You own the client relationship, we do the deal.

Our Mission and Values

It is our mission to establish good communications from the beginning. From the novice to the experience, we are here to serve you, so you can serve your clients better, expand your service offering thereby reaching your financial goals faster, and growing your reputation in your community. So we created this guide to help you and your team to understand the process and where we are every step of the way. We do this by adopting the following values:

- **Integrity:** You can count on us, we do what we say we are going to do
- **Communications:** Delightful communications, regular status reporting
- **Trust:** We will negotiate the deal with the highest level of integrity and follow the applicable laws that govern the deal.
- **Innovative:** We boil down the complicated to the simple. We create solutions that help your client navigate the purchase or sale of their commercial real estate or business easily and effortlessly and structure the deals in creative ways to generate a win-win-win for everyone.

Reasons to Refer your clients to HighTech Global?

Reason #1: Specialized Commercial Real Estate and Business Brokerage Expertise

Commercial real estate and business brokerage requires deep knowledge of market trends, property analysis, business financials, zoning regulations, and complex negotiations. If commercial real estate or business isn't your area of expertise, you can trust HighTech Global to provide your clients with the guidance and services they need for a successful transaction. We deliver expert solutions while you maintain the trusted relationship with your client.

Reasons to Refer your clients to HighTech Global?

Reason #2: Not Licensed in Florida? We've Got You Covered.

If you're not licensed to conduct business in Florida, partnering with HighTech Global allows you to extend your services into this lucrative market without additional licensure in the state. Our Florida-based team specializes in state-specific regulations and market insights, ensuring your clients receive exceptional support.

Reason #3: Funding for Projects

Finally, some clients need funding to bring their projects to life, whether it's financing a property acquisition, funding renovations, or securing capital for a new business venture. HighTech Global connects clients to tailored financing solutions through our extensive private lender network, helping them secure the capital they need to succeed. By referring clients for funding, you're not only helping them achieve their goals but also positioning yourself as a valuable resource.

What's *DIFFERENT* About
HighTech Global?



Benefits of Partnering with HighTech Global:

By referring clients to HighTech Global, you're not only earning competitive referral fees but also, growing your business and influence as well as positioning yourself as a valuable resource for your clients. Here are some of the benefits of partnering with us:

- a. **Earn Referral Income:** With referral fees ranging from 10% to 30%, depending on your level of participation, you can significantly boost your income while focusing on your core expertise.
- b. **Maintain and Grow Client Relationships:** Even if commercial real estate or funding isn't your specialty, you can offer these services to your clients through us, keeping them engaged and satisfied while expanding your service offerings.
- c. **Leverage Our Expertise:** Tap into our specialized knowledge in commercial real estate, business brokering, and financing without having to navigate the complexities of these types of transactions yourself.
- d. **Stay Informed:** We provide regular updates on the transaction's progress, keeping you informed and confident in the process. Your involvement, even at a "hands-off" level, will reflect positively on you to your client.
- e. **Expand Your Business Reach:** By partnering with HighTech Global, you can enter new markets (e.g., Florida) or commercial real estate sectors without additional licensing or training, giving you access to more opportunities.
- f. **Professional Reputation Boost:** Our commitment to integrity, communication, and client success ensures that your referral experience enhances your credibility and reputation in the industry.



The HTG Referral Process

Step 1: Is your client and the deal ready?

This step includes an intake process so you should have all of the initial information necessary to get started. This is also our (you and HTG) first impression! So let's make it a good one.

1. Referrals types include three primary services:
 - a. Which service am I referring this client to?
 - i. Commercial Real Estate (CRE)
 - ii. Business Brokerage
 - iii. Project Financing
 - b. What is my participation level?
 - i. Hand the deal over
 - ii. Attend the calls/Be active in the deal (CRE & Biz only)
 - iii. JV or split (CRE & Biz only)
 - c. Not sure?

Inquiry only – FREE 30 min consulting with your client

Step 2: Registering your client and the deal.

See the checklist of vital information and supporting documentation we need to move forward. It's prioritized from the general to the specific. Once you have the necessary information, you can submit the Referral Agreement. The deal will be assigned an ID, so we can track it through the process.

1. Collect the Agent information
2. Collect the Client information, including the best way to reach them.
3. Collect information about the deal
4. Submit the Referral Agreement, using the attached form
 - a. After it is signed by all parties, we will set up an introductory call with the client



Step 3: Call with the client – Is the client ready to move forward?

This is an introductory call that you set up with your client. It serves as a great way to hand off the services for further processing by our team. On the call, we will discuss the following:

- Review the deal opportunity with the client. Assess whether we can help them achieve their goals both financially and professionally.
- We will discuss the process, whether it's a purchase and sale transaction or a consulting opportunity.
- We will cover the important points; i.e. roles and responsibilities for each group, compensation expectations and overall timing.
- We will discuss expectations for this process to unfold easily and our commitments to the deal client and their goals.

When the client agrees to move forward, we will issue an engagement letter or contract and prepare the list of due diligence items, schedule on-site visits, if necessary and etc. Once the client is engaged, we will move to the next step.



Step 4: Doing the Deal: From Due Diligence to preparing for closing.

This is where the fun begins. Just like any transaction, there are many twists and turns to get a deal to the closing table. It's where our HTG expert team of professionals shine. We handle all of the details for the transaction to completion, i.e. from marketing to finding the right buyer/seller or securing the right financing partner all the way through closing.

We handle the transaction details and mitigate the risks by having a complete execution plan written for the specific deal. We will follow all of the State, Federal, and Country of Origin laws and eXp guidelines.

Some activities vary between types of services, but here's a high-level step-by-step breakdown of activities:

Due Diligence Completion:

- Confirm completion of all due diligence activities, including property inspections, title searches, environmental assessments, and zoning compliance checks.
- Ensure that any issues identified during due diligence have been resolved or accounted for in the deal.

Finalizing Financing:

- Secure final approval of mortgage or other financing terms from the lender.
- Review and confirm the interest rates, loan amount, repayment schedule, and any other financing details.

Title Review and Insurance:

- Finalize the title search to ensure there are no outstanding liens or disputes.
- Obtain title insurance to protect against future claims.

Obtaining Necessary Approvals and Clearances:

- Ensure all necessary approvals from government bodies, homeowners' associations, or other relevant entities are obtained.
- Clear any contingencies stated in the purchase agreement.

Step 4: Doing the Deal: From Due Diligence to preparing for closing. (con't)

Review and Finalize Closing Documents:

- Prepare and review all closing documents, including the deed, bill of sale, mortgage documents, closing statement, and any transfer documents.
- As with all agreements, legal counsel should review these documents to ensure accuracy and completeness.

NOTE: This can add significant time to the schedule.

Closing Statement Review:

- Examine the HUD-1 Settlement Statement or a similar closing statement for accuracy.
- Confirm that all financial transactions, including purchase price, loan amounts, credits, and pro-rations, are correctly listed.

Scheduling the Closing:

- Coordinate with all parties (buyer, seller, attorneys, lender, and closing agent) to schedule the closing date and time.
- Ensure all parties have the necessary documents and information ahead of the meeting.



Step 5: Closing the deal

The Closing is the most anticipated part of the deal. Closing means many things to different people around the table. For some it is an end to something and an opportunity to move on, for others it's the beginning of a new opportunity of excitement and delivering on big dreams. Plus, upon closing, each participant gets paid from the closing statement!

I know these details seem simple enough, it's the complications behind the activity that can make or break the deal and keep it on target to close. People, agencies, loan delays, contractual issues, valuations, legal, market conditions, insurance issues, and even mother-nature can influence whether the transaction closes. It is our job to be proactive and adopt risk mitigation strategies to help ensure a perfect closing.

Of course, the more complex the transaction is, the greater the risk to closing is. To mitigate risks and ensure a smooth transaction, it is essential to take proactive measures. Conducting thorough due diligence early on, including comprehensive property inspections, title searches, and environmental assessments, can uncover and address potential issues before they become roadblocks. Maintaining clear and consistent communication between all parties—buyers, sellers, brokers, and attorneys—is crucial to avoiding misunderstandings and delays. Anticipating potential hurdles and building contingency plans into the contract, such as extensions for financing or inspections, provides flexibility to navigate unexpected challenges. Finally, working with experienced brokers, attorneys, and inspectors ensures that the complexities of the transaction are handled professionally and efficiently. It is as much of an art as a science to get a transaction to the closing table.

Step 5: Closing the deal (Con't)

Here is a high-level list of activities to closing the deal:

Review of the Due Diligence items:

- Review the due diligence and supporting documentation
- Consult with the lenders, third parties, client and etc that are ready to close.

Final Walk-Through:

- Conduct a final walk-through of the property to ensure it is in the agreed-upon condition.

Closing Meeting:

- Attend the closing meeting with all necessary parties (in person, remote).
- Review and sign all closing documents, including the mortgage, deed, and transfer statements.
- Verify banking coordinates. Then transfer closing costs and down payments as outlined in the closing statement.
- Release the keys to the new owner.

Recording the Deed:

- Ensure that the deed and any other required documents are officially recorded with the appropriate government office.
- This step legally transfers ownership and secures the mortgage.

Post-Closing Activities:

- Distribute copies of the closing documents to all relevant parties.
- If a real estate agent was involved, ensure they receive their commission and the Referral Partner is paid.
- The buyer should ensure they have received all keys, access codes, or other necessary items.

Follow-Up:

- The buyer/seller should follow up with their lender, insurance company, and any other relevant parties to confirm that all post-closing activities have been completed.
- The agent should follow up with their client to congratulate them on the sale and offer additional services or referrals.



Step 6: Final: Closing the file

Upon satisfactory completion of the deal, the following activities will occur:

1. We will close out the file with eXp and any other brokers involved with the deal.
2. The referring agent and clients will receive a “How did we do” survey to look for areas where we can make improvements on our services.



Let's Take the Next Step Together

At HighTech Global, we're here to make the referral process simple, seamless, and rewarding for you and your clients. Whether you're new to commercial real estate, not licensed to operate in Florida, or looking to provide funding solutions, our team is ready to step in and deliver exceptional results. With our expertise, transparency, and commitment to excellence, you can trust us to handle every detail while keeping you informed at every step.

We know how important your clients are to you, and we're honored to partner with you in providing them with the best possible service. Although the transactions are complex, we want to keep the referral process straightforward. The tools are ready, and our team is here to support you; together, we'll create opportunities, deliver value, and ensure success.

If you're ready to refer a client or have any questions, please reach out. Let's work together to help your clients achieve their goals while growing your business and reputation. Your success is our priority—**Let's take the next step together!**



Supplemental Information



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Participation Levels and Agent Benefits

At HighTech Global, we recognize that every agent-client relationship is unique. That's why our referral program offers flexible participation levels tailored to fit your level of involvement and expertise. Whether you prefer to simply hand off the deal or stay actively engaged, we ensure you have the tools, resources, and support to make the process seamless and rewarding.

Participation Levels Explained:

1. Hand Off the Deal:

- **What It Means:** You refer the client, and we handle everything from intake to closing. This is ideal if you prefer to focus on your core business while still earning referral income.
- **Your Role:** Provide us with the client's details, any supporting documentation, and a signed Referral Agreement.
- **Referral Fee:** Typically 10-15% of the total net commission earned.

2. Active Participation:

- **What It Means:** You remain involved in the process, sitting in on calls and collaborating with our team to ensure your client's needs are met. This is ideal for agents who want to stay informed or contribute expertise but don't want to handle the full transaction.
- **Your Role:** Participate in client discussions, assist with key decisions, and contribute insights when necessary.
- **Referral Fee:** Typically 20-30%, reflecting your active involvement in the deal.

3. Joint Venture (JV):

- **What It Means:** You fully partner with HighTech Global, sharing the responsibilities of the transaction. This level is perfect for larger, more complex deals requiring collaboration.
- **Your Role:** Work alongside our team to navigate every step, from due diligence to closing, while sharing resources and expertise.
- **Referral Fee:** Typically a 50-50 commission split, as responsibilities are shared equally. For qualified candidates only.

4. Inquiry Only – Free Consultation:

- **What It Means:** You refer the client for a free 30-minute consultation with our team to explore their needs and determine if HighTech Global is the right fit. This option allows you to maintain a trusted relationship with your client while offering them initial guidance without cost.
- **Your Role:** Connect the client with us and let us handle the consultation.
- **Referral Fee:** N/A unless the consultation leads to an active transaction.

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