



License Transfer Checklist

Follow these steps to streamline your onboarding Experience at Real

- ☐ [CLICK HERE](#) and bookmark for step by step guidance
- ☐ Send RMLS subscriber change form to Jason Walchli at ORBroker@TheRealBrokerage.com for signature and forward to FrontDesk@RMLS.com.
- ☐ Notify your **LOCAL BOARD** (PMAR, etc) of your new brokerage via email. If you are a new agent, you will need to join a local board or Realtors.
- ☐ **On your join date check your email(and spam) for confirmation that your license has been transferred and for onboarding information** containing invite to [reZEN app](#) Real's proprietary all-in-one app and transaction management platform where everything lives
- ☐ Set up/transfer forms and e-signature software. If the account is provided by your current brokerage you will need to call support to have them de-link your account. It's easy, but it's a call. If you are an existing Digisign user provided by brokerage you will need to create a new forms account [HERE](#). It is a very quick process and is free to all OREF Subscribers, but will require you to put your license number in to verify you have purchased your OREF forms. In the event of a pop-up, that says "this license number is already in use." you can call, chat or email Skyslope to have them IMMEDIATELY de-link your existing account that the former brokerage had you registered with allowing you to create your new account. [HERE](#) is a link to all contact options for Skyslope. PRO-TIP/ACTION ITEM: If you are using templates, take screenshots of the template page and corresponding templates to be easily re-created within your new account, then email them to yourself/TC ahead of offboarding from your previous brokerage.
- ☐ Lean on your sponsoring agent and network to get settled into your new digs and keep you up and running in your practice.
- ☐ Download the reZEN App on [iOS](#) or [Android](#).
- ☐ Refer to the full Real Checklist [HERE](#) for what to expect
- ☐ [JOIN the Real Insiders Classroom in Skool](#)

- ☐ **CREATE A REAL BOOKMARK FOLDER IN YOUR BROWSER & ADD THE FOLLOWING**
 - ☐ [Bolt](#) Desktop Version of ReZEN the Real App
 - ☐ [Workvivo](#) This is the "virtual office" for masterminds, referrals, connection, etc.
 - ☐ [Real FAQ](#) Everything you ever wanted answered from Real
 - ☐ [Real CE Shop](#) 30% discount for CE
 - ☐ [HealthCare/Agent Benefits](#) (if enrolling)

- ☐ **UPDATE DIGITAL MARKETING** to reflect your name or team name and/or "Real Broker" as your brokerage.
 - ☐ Outgoing Voicemail
 - ☐ E-Mail Signature
 - ☐ RMLS header

- ☐ Set up Sphere (optional) (Goal setting, upload and tag contacts and transactions)
- ☐ Website bio/contact page
- ☐ Blogs
- ☐ Zillow
- ☐ Realtor.com
- ☐ Homes.com
- ☐ Homesnap
- ☐ Linked-In
- ☐ Facebook
- ☐ Instagram
- ☐ Twitter
- ☐ TikTok
- ☐ Other sites

WHERE TO GO FOR SUPPORT:

Your sponsoring agent should be able to answer questions & guide you on where to go if they don't have the answer

Get up and running @ Real: [THIS FRAMEWORK](#) will help you get started

Support FAQs [Everything you ever wanted to know and then some](#)

Licensing/Compliance: State Broker

Support: Leo or Support@TheRealBrokerage.com