



license transfer checklist

PRIOR TO LICENSE TRANSFER:

- ☐ Apply to [Real](#), state your join date, sign the ICA and pay the \$249 join fee
- ☐ **Export contacts, transactions, other pertinent information** from existing platforms to .csv if your CRM is owned by existing brokerage. [Here](#) is an import file for your contacts. [Here](#) is an import file for your transactions.
- ☐ Fill out the [RMLS Subscriber Change Form](#) with effective date being the date of your license transfer
- ☐ **TRANSACTIONS RELEASED** by former brokerage, we will need to obtain authorization of release, terms of release, and list of transactions to be transferred in writing by former Managing Broker. Execute appropriate addenda signed by parties to the transaction with "All parties understand that listing agent/buyer's agent is licensed with Real Broker effective xx/xx/xxxx (join date).
- ☐ **CREATE & ORDER SIGNAGE.** [HERE](#) are the state guidelines for marketing compliance. Bear Printing and [Buz White](#) are the most common local printers, however there are numerous online print shops who can help you order signage whether using Real templates or custom. If going with a custom design, be SURE to have another set of eyes on it to make sure it is in line with brand and state compliance.

AFTER LICENSE TRANSFER:

- ☐ Send RMLS subscriber change form to Rosalie Warner 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](#)**
- ☐ **JOIN [Local Collective](#) on What's App**
- ☐ **JOIN [Real Broker of Oregon](#) on What'sApp**

☐ **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. Be sure to set your notifications appropriately within the app so you don’t get bombarded via Bell (top right) -> Gear icon -> and select if and how you want to be notified when new posts are made. It is recommended to get email and push notifications from the following:
[Oregon State Brokers](#)
[One Real Academy](#)
- ☐ [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

Real support: Leo AI or your sponsoring agent