

# New Client Intake Form

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Dear Agent,

Please complete this form so that I may have all the needed information to begin working on your transactions. This must be filled out prior to receiving any contracts. Your passwords will be kept secure. Thank you!

Full Name

Phone

Email

Preferred Method of Contact

Brokerage Name

License #

Name & Link to Compliance Software/Website. **Please include Username and Password**

Preferred Vendor Name, Email, Phone Number. e.g. Lender

Preferred Vendor Name, Email, Phone Number. e.g. Title Company/Escrow

# New Client Intake Form *continued*



Preferred Vendor Name, Email, Phone Number. e.g. Home Inspector

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Website/Software Username and Password TC will need to work on transactions (MARIS):

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Commission Disbursement Procedure. e.g. Name of your document, how to submit

Please include anything else we need to know to process your transactions that you feel is important to us

**You are in very good hands!**

*Christina Smith*

Owner, RealTime TC