

**CHARLOTTE AREA REFERRAL GROUP EXCHANGE
ONBOARDING FORMS FOR INDEPENDENT CONTRACTORS**

1. W-9 FORM (TAXPAYER IDENTIFICATION NUMBER AND CERTIFICATION)

A completed W-9 form is required for tax purposes to report referral commissions earned. Contractors must submit an IRS-compliant W-9 form before receiving commission payments.

2. REAL ESTATE LICENSE VERIFICATION FORM

Contractor Name: _____
License Number: _____
Issuing State: _____
Expiration Date: _____
License Status (Active/Inactive): _____

By initialing below, I confirm that my real estate license is active and in good standing with the state's real estate commission and provided a copy to Charlotte Area Referral Group Exchange.

Initial: _____

3. DIRECT DEPOSIT AUTHORIZATION FORM

Bank Name: _____
Account Number: _____
Routing Number: _____
Account Type (Checking/Savings): _____

I understand that if this information changes, I am are required to notify the firm prior to receiving any payments. I will not hold the firm responsible for any errors in sending to a non-updated account.

I authorize Charlotte Area Referral Group Exchange to deposit my referral commission earnings into the above account.

Contractor Signature: _____
Date: _____

PLEASE CHOOSE ONLY ONE OPTION ON THIS PAGE

4-a. CREDIT CARD AUTHORIZATION FORM

I authorize Charlotte Area Referral Group Exchange to charge my credit card for any applicable annual membership fees and onboarding fees.

Cardholder Name: _____

Card Number: _____

Expiration Date: _____

CVV: _____

Billing Address: _____

By signing below, I authorize the above charges and agree to notify Charlotte Area Referral Group Exchange of any changes to my payment details.

Cardholder Signature: _____

Date: _____

4-b. AUTO BANK DRAFT AUTHORIZATION FORM

I authorize Charlotte Area Referral Group Exchange to initiate withdrawals from my bank account for annual membership fees and any other authorized charges.

Bank Name: _____

Account Number: _____

Routing Number: _____

Account Type (Checking/Savings): _____

By signing below, I agree to allow Charlotte Area Referral Group Exchange to process automatic withdrawals until I provide written notice to cancel this authorization.

Account Holder Signature: _____

Date: _____

5. REFERRAL SUBMISSION GUIDELINES & COMPLIANCE AGREEMENT

I acknowledge that all referral submissions must be submitted using the official company system and meet the eligibility criteria outlined in the Independent Contractor Agreement.

Failure to adhere to these guidelines may result in delayed or forfeited commission payments.

Contractor Signature: _____

Date: _____

6. AGENT INFORMATION SHEET

Full Name: _____

Phone Number: _____

Email Address: _____

Mailing Address: _____

Emergency Contact Name: _____

Emergency Contact Phone: _____

COMPANY POLICIES ACKNOWLEDGMENT FORM

I acknowledge that I have reviewed and understand the policies and procedures, which are below, of Charlotte Area Referral Group Exchange, including referral submission rules, commission payouts, and licensing requirements.

INTRODUCTION

Welcome to Charlotte Area Referral Group Exchange! This policy and procedure manual provides an overview of the expectations, procedures, and guidelines for all independent contractors affiliated with our firm.

MEMBERSHIP & FEES

- Annual membership fee of **\$50**, due on **January 1st**.
- Mid-year joiners will be charged based on the following schedule:
- A **one-time onboarding fee of \$50** is required upon joining.
- Payments can be made via **credit card authorization or auto bank draft**.

INDEPENDENT CONTRACTOR STATUS

- All agents are considered **independent contractors**, not employees of the firm.
- Agents are responsible for maintaining their **real estate license** and meeting all state requirements.
- Taxes, insurance, and business expenses are the responsibility of the agent.

REFERRAL PROCESS

- All referrals must be submitted using the **official referral submission form**.
- Qualified referrals within the **Greater Charlotte Market** will receive a **33% referral fee**.
- Out-of-state and out-of-market referrals will receive a **25% referral fee**.
- All referrals will be placed with **Tri-Becker United**, our sister company.
- Agents must not directly solicit clients already referred.

PAYMENT & COMMISSION DISTRIBUTION

- Commissions are paid upon the **successful closing** of the referred transaction.
- Payments are distributed via **direct deposit** to the agent's registered bank account.
- Agents must keep banking details up to date to avoid payment delays.

CODE OF CONDUCT

- Agents must adhere to all **state real estate laws** and ethical standards.

- Confidentiality must be maintained regarding client information.
- Professionalism and integrity are expected in all interactions.

LICENSE REQUIREMENTS

- Agents must maintain an **active and valid real estate license**.
- Continuing education and license renewals are the agent's responsibility.
- Proof of active license status may be requested periodically.

TERMINATION POLICY

- Either party may terminate the agreement with a **30-day written notice**.
- Annual fees are **non-refundable** upon termination.
- Failure to maintain an active license or adhere to policies may result in immediate termination.

COMMUNICATION & SUPPORT

- Official firm communications will be sent via **email**.
- Agents should ensure they have an updated email on file.
- For support, agents can contact the **brokerage office** for assistance.

MODIFICATIONS TO POLICIES

- Charlotte Area Referral Group Exchange reserves the right to update policies as needed.
- Agents will be notified of any changes via email.

I have read and understand the policies and procedures outlined in this manual. I agree to abide by the guidelines set forth by Charlotte Area Referral Group Exchange.

Agent Name: _____

Agent Signature: _____

Date: _____