

Agent Onboarding Packet

Everything we need to get you set up, licensed with us, and paid.

Welcome aboard. You're a few minutes away from keeping your license active, dropping the dues, and getting paid on every referral that closes. Complete this packet, sign it, and send it back with the rest of your paperwork.

Your onboarding checklist

1. **Independent Contractor Agreement**, signed
2. **IRS Form W-9**, using the current version from irs.gov/FormW9
3. **This Onboarding Packet**, completed and signed (Sections 1–5)
4. **A copy of your active real estate license**

Email everything to **Refer@cltreferral.com**. We'll onboard you within 1–2 business days and email your \$85 membership invoice. Once it's paid, you're live and ready to refer.

1 Agent Information

FULL LEGAL NAME

PREFERRED NAME

MOBILE PHONE

EMAIL ADDRESS

MAILING ADDRESS

CITY

STATE

ZIP

EMERGENCY CONTACT NAME

EMERGENCY CONTACT PHONE

2 License Verification

STATE(S) LICENSED

☐ North Carolina ☐ South Carolina

NC LICENSE #

NC EXPIRATION

SC LICENSE #

SC EXPIRATION

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

INITIALS

3 Direct Deposit Authorization

This is how you get paid. Referral compensation is sent by direct deposit after a referred transaction closes and the firm receives payment.

BANK NAME

NAME ON ACCOUNT

ROUTING NUMBER

ACCOUNT NUMBER

ACCOUNT TYPE

☐ Checking ☐ Savings

I authorize Charlotte Area Referral Group Exchange to deposit my referral compensation into the account above. I will notify the firm in writing before any payment if this information changes, and I will not hold the firm responsible for payments sent to an account I have not updated.

SIGNATURE

DATE

Protect your banking info. Don't email this page as a regular attachment. Call 803-724-4477 to give your details by phone, or send the file password-protected and text us the password.

4 Membership Fee Acknowledgment

- Membership is a flat **\$85 per year**, invoiced when you join and renewed every **January 1st**.
- There is **no proration**. The fee is the same no matter when during the year you join.
- Fees are **non-refundable**, including if you leave the firm.
- You'll pay through the secure payment link in your emailed invoice. **We never ask for card numbers on paper or by email.**

INITIALS

5 Policies & Procedures

These are the ground rules for every agent affiliated with Charlotte Area Referral Group Exchange. The Independent Contractor Agreement controls if anything here conflicts with it.

Referral-Only Status

- Your license is affiliated with us only to make referrals. You won't list, show, or negotiate while you're here.
- We are not members of a Realtor association or the MLS, so you are not required to join either.

Referral Process

- Submit every referral on the official Referral Submission Form, signed by you and our Broker-in-Charge.
- Referrals must come in **before** the client engages with another agent. Rental referrals are not accepted.
- Local referrals are placed first with a qualified agent at our affiliated brokerage, United Real Estate Queen City (Tri-Becker United, LLC). Out-of-market referrals go to a vetted agent in the client's market.
- Once a client is referred, do not solicit or service that client directly.

How You Get Paid

- **33%** of the receiving firm's gross commission on local (Greater Charlotte market) referrals.
- **25%** of the receiving firm's gross commission on out-of-market, out-of-state, and international referrals.
- The firm keeps a **10% processing fee** from that amount. You receive the other 90%.
- Bonuses, incentives, and client-paid admin fees are not included. Payment is made by direct deposit after closing, once the firm is paid.

Independent Contractor Status

- You are an independent contractor, not an employee. Taxes, insurance, and business expenses are your responsibility. You'll receive a 1099.

License & Conduct

- Keep your license active and complete your continuing education and renewals on time. We may ask for proof of active status.
- Follow all state and federal real estate laws, keep client information confidential, and act with professionalism and integrity.

Termination

- Either party may end the relationship with 30 days' written notice. Fees are non-refundable.
- Letting your license lapse or breaking these policies may result in immediate termination.

Communication & Updates

- Official firm communication is sent by email, so keep your email address current.
- We may update these policies and will notify you by email when we do.

Acknowledgment

I have read and understand this onboarding packet and the policies above, and I agree to follow them.

AGENT PRINTED NAME

DATE

AGENT SIGNATURE

Welcome to the network. Call or text Ernie 'Big Ern' Becker anytime at 803-724-4477.