Listing Contract SOP

Preliminary Step - Open Escrow
☐ Contact your preferred Title Office to Open Title.
☐ Request a Title Report and Listing Packet, which will include and verify:
- Owner's Names
- Property Location
- Parcel Number
- Exhibit A

Step 1 – Create the Listing File in SkySlope
☐ Log into SkySlope.
☐ Create a new listing transaction.
☐ Draft Listing Agreement and required addenda using approved forms.
☐ Confirm property address is entered correctly throughout.
☐ Confirm commission and key business terms are complete.
☐ Verify all necessary information is included and accurate.
☐ Verify all required fields are filled.
☐ Submit for Broker review if licensed less than 2yrs or if you have any questions.

Step 2 – Obtain Signatures
☐ Send documents for signature through SkySlope, Docusign, or Digisign.
☐ Confirm Listing Agreement is fully signed.
☐ Confirm all additional addenda and disclosures are fully signed.

Step 3 – Review for Accuracy and Completeness
Before submission, confirm:
☐ All details are fully filled in.
☐ All required addenda are attached.
If corrections are needed, please **fix them before uploading**.

Step 4 – Upload and Submit for Compliance
☐ Upload all fully signed documents to the SkySlope checklist within 48 hours of receipt
☐ Email a copy of the complete signed listing package to: WAdocs@epiquerealty.com
☐ Use subject line format: *LISTING – Full Property Address* (Street, City, Zip)
Agents are responsible for SkySlope file and listing-side compliance prior to mutual acceptance.

Step 5 – Accepted Offer
Once a Purchase & Sale Agreement has been mutually accepted:
☐ Confirm the contract is fully signed
☐ Begin the **Accepted Purchase & Sale SOP** process
The Transaction Coordinator becomes involved only after a Purchase & Sale Agreement has been mutually accepted.

Buyer Broker Services Agreement SOP

Step 1 – Obtain Signatures
Before providing services for a buyer, ensure the following required documents are fully signed.
☐ Confirm the P1 Real Estate Agency in Washington pamphlet is provided, initialed, and dated.
☐ Confirm Form 41 Buyer Brokerage Services Agreement (BBSA) is fully signed by all buyer clients and Buyer Broker.
☐ Confirm all required fields and dates are completed.
☐ Verify agreement terms and expiration date are accurate.

Step 2 – Submit for Compliance
Within 48 hours of receiving the fully signed agreement:
☐ Email the signed Form 41 BBSA to: WAdocs@epiquerealty.com
☐ Use subject line format: BBSA – Buyer Client Name(s)
Example: *BBSA – John & Mary Smith*

Step 3 – Document Retention
Buyer Brokerage Agreements must be retained by the firm even if the client does not purchase a property. Submitting the signed agreement ensures the document is archived for compliance.

Step 4 – If Buyer Does NOT Go Under Contract
No further action is required.

Step 5 – If Buyer DOES Go Under Contract
If the buyer enters into a mutually accepted Purchase & Sale Agreement:
☐ Follow the Accepted Purchase & Sale SOP.
☐ Confirm all Buyers listed on the offer are included on the BBSA.
☐ Include the signed Form 41 BBSA when submitting the Accepted PSA contract package.
☐ Upload the Buyer Brokerage Agreement into the SkySlope transaction file.

Accepted Purchase & Sale SOP

Step 1 – Accepted Offer

Once a Purchase & Sale Agreement has been accepted and fully signed:

☐ Review the purchase contract to ensure all documents are fully signed.

☐ Submit the mutually accepted PSA to Title/Escrow, the lender, and all involved agents within 24 hours.

☐ Visit wastateagents.com/listing-launch, scroll down and select "Request TC Services."

☐ Completely fill out the form with all required information, then hit submit.

☐ Submit the fully signed contract package within 48 hours of receipt to: WAdocs@epiquerealty.com and to your selected Transaction Coordinator

☐ Use subject line format: *ACCEPTED PSA – Full Property Address* (Street, City, Zip)

☐ Include in the email:

- Basic contract terms
- Name, phone number, and email for all clients, agents, lender, and title/escrow
- Escrow file number if available

☐ Request that Title/Escrow CC the Transaction Coordinator on all transaction correspondence.

Once submitted, the Transaction Coordinator will begin assisting with the file.

Step 2 – Active Transaction Management

Upload all fully signed documents within 48 hours of receipt to SkySlope or email them to: WAdocs@epiquerealty.com and your selected Transaction Coordinator

☐ Use subject line format: *FORM NAME – Full Property Address* (example: 35R - 123 Main St)

☐ Earnest money receipt or confirmation.

☐ Buyer pre-approval or lender documentation.

☐ Inspection responses and repair agreements.

☐ Appraisal or financing related documents.

☐ Extensions, amendments, and contingency removals.

☐ Any additional signed communications affecting the contract

Remember to:

☐ Respond to requests for additional documents.

☐ Follow instructions provided by the Transaction Coordinator.

If it is fully signed, upload it. The TC provides reminders and compliance support, but agents remain responsible for all documents and contract deadlines.

Step 3 – Pre-Closing

7–10 Days Prior to Closing:

☐ Request Commission Disbursement Authorization (CDA)
CDA Form: https://form.jotform.com/252708522568059

☐ Once the signed CDA form is received, review and confirm it is accurate.

☐ Request changes if needed.

☐ Submit final CDA to Title and verify a copy is in the SkySlope file.

☐ Confirm that Title has proper disbursement instructions, per the CDA

Failure to properly follow these CDA steps may delay your commission payment.

Prior to Closing:

☐ Confirm SkySlope checklist is complete.

☐ Confirm closing date is accurate.

☐ Confirm all required documents are uploaded.

Step 4 - Transaction Complete

☐ Upload final settlement statement.

☐ Confirm final closing documents are uploaded.

Once closing has occurred and all required documents are uploaded, the transaction file is considered complete.

Unaccepted Purchase & Sale SOP

Step 1 – Finalize Contract Status
If a Purchase & Sale Agreement is declined, rejected, or expires without acceptance:
☐ Confirm the contract clearly reflects its final status (Declined, Rejected, or Unaccepted).
☐ Ensure all counters, addenda, and related documents are included in the file.
All contracts signed by a client must be retained for compliance, even if the offer is not accepted.

Step 2 – Submit for Compliance
Within 48 hours of the contract being declined, rejected, or expiring:
☐ Email the full contract package to: WAdocs@epiquerealty.com
☐ Use subject line format:
UNACCEPTED PSA – Full Property Address (Street, City, Zip)
☐ Include in the email body:
- Client names
- Property address
- Agents/Brokerages involved
- Note that the offer was declined, rejected, or expired (reason, if known)

☐ Include the following attachments:
- Original PSA
- Any counters or addenda
- Any signed communications affecting the contract

Step 3 – SkySlope File (If Created)
If a SkySlope transaction file was created for the offer:
☐ Upload the unaccepted PSA and related documents.
☐ Mark the transaction as Cancelled / Not Accepted.
If no SkySlope file was created, email submission satisfies compliance requirements.

Step 4 – File Complete
Once the unaccepted contract has been submitted and archived, no further action is required.
The file is considered complete for compliance purposes.

BPO (Broker Price Opinion) Contract SOP

Step 1 – Obtain Signatures
Before completing a Broker Price Opinion:
☐ Confirm the BPO contract is fully signed.
☐ Verify all required information and property details are included.

Step 2 – Submit for Compliance
Within 48 hours of receiving the fully signed BPO contract:
☐ Email the signed BPO contract to: WAdocs@epiquerealty.com
☐ Use subject line format:
BPO – Full Property Address (Street, City, Zip)

Step 3 – Submit Supporting Documents
If additional documentation is required for the BPO assignment:
☐ Submit the completed CMA or valuation report.
☐ Submit any required addenda or supporting documentation.
☐ Request Commission Disbursement Authorization (CDA)
CDA Form: https://form.jotform.com/252708522568059
☐ Once the signed CDA form is received, review and confirm it is accurate.
☐ Request changes if needed.
☐ Submit final CDA to Title and verify a copy is in the SkySlope file.
☐ Confirm that Title has proper disbursement instructions, per the CDA.
Failure to properly follow these CDA steps may delay your commission payment.

Step 4 – Proof of Payment
Once payment for the BPO is received:
☐ Submit proof of payment to the Transaction Coordinator.
☐ Upload proof of payment to the SkySlope file if one was created.

Step 5 – File Complete
Once the BPO contract and supporting documentation have been submitted, the file is complete for compliance purposes.

Referral Agreement SOP

Step 1 – Complete the Referral Agreement
☐ Use the Epique Realty Referral Agreement for ALL referrals.*
☐ If an outside brokerage also requires a state or company-specific referral form, complete that form in addition to the Epique form.
☐ Fill out the Epique Realty Referral Agreement, leaving the Epique brokerage address line blank.
☐ Obtain all required signatures.
☐ For WA Broker signature, send to: WaBroker@epiquerealty.com.
☐ Once fully signed, submit to WAdocs@epiquerealty.com for compliance and record retention.
☐ Send the signed **Referral Agreement, Epique's W9, and the CDA Instruction** page to the cooperating agent.
☐ Use subject line: *REFERRAL: Client Name*.
☐ Do *not* create a SkySlope transaction for a referral form.
*__Epique's Referral Agreement and CDA forms include all necessary instructions to ensure both the Agent and Epique are paid out properly. Using any other forms could delay or prevent payment.*__

Step 2 – Determine Your Referral Type
Select the appropriate referral type and skip to that paragraph.
A → Epique to Epique Incoming (I'm receiving the referral)
B → Epique to Epique Outgoing (I'm sending the referral)
C → Outside Brokerage to Epique (I'm receiving the referral)
D → Epique to Outside Brokerage (I'm sending the referral)

A – Epique to Epique Referral (Receiving Agent)
When receiving a client from another Epique agent:
☐ Complete Step 1 before providing services to the client.
☐ Follow the Listing or Buyer SOP, as appropriate.
☐ When the client goes under contract, follow the Accepted Purchase & Sale SOP.
☐ Provide the signed **Referral Agreement, Epique's W9, and the CDA Instruction** page to Title.
☐ Include the Referral Agreement in the SkySlope transaction file.
7–10 Days Prior to Closing:
☐ Request Commission Disbursement Authorization (CDA), including info for BOTH Epique Agents.
CDA Form: https://form.jotform.com/252708522568059
☐ Once the signed CDA form is received, review and confirm it is accurate.
☐ Request changes if needed.
☐ Submit final CDA to Title and verify a copy is in the SkySlope file.
☐ Confirm that Title has proper disbursement instructions, per the CDA and Referral Agreement.
Failure to properly follow these CDA steps may delay your commission payment.

B – Epique to Epique Referral (Sending Agent)
When referring a client to another Epique agent:
☐ Complete Step 1 before transferring the client.
☐ Maintain communication with the receiving agent and Title/Escrow through closing.
☐ Do NOT create a CDA. The Receiving Epique Agent will create the necessary CDA for both sides.
☐ Verify the settlement statement reflects the correct referral amounts.
☐ Confirm that Title has proper disbursement instructions per the CDA and Referral Agreement.

C – Epique Incoming Referral (Receiving Agent)
When receiving a client referral from another brokerage:
☐ Complete Step 1 before providing services to the client.

☐ Obtain the referring brokerage's W-9 and verify correct brokerage/agent contact information.
☐ Follow the Listing or Buyer SOP, as appropriate.
☐ When the client goes under contract, follow the Accepted Purchase & Sale SOP.
☐ Upload the Referral Agreement and the referring brokerage's W-9 to the SkySlope file.
☐ Provide the signed Referral Agreement, W9, and the CDA Instruction page to Title/Escrow.

7–10 Days Prior to Closing:

☐ Request Commission Disbursement Authorization (CDA)
CDA Form: https://form.jotform.com/252708522568059
☐ Once the signed CDA form is received, review and confirm it is accurate.
☐ Request changes if needed.
☐ Submit final CDA to Title and verify a copy is in the SkySlope file.
☐ Confirm that Title has proper disbursement instructions, per the CDA and Referral Agreement.

Failure to properly follow these CDA steps may delay your commission payment.

D – Epique Outgoing Referral (Sending Agent)

When referring a client to an agent at another brokerage:

☐ Complete Step 1 before transferring the client.
☐ Provide Epique's W-9 and fully signed Referral Agreement to the receiving brokerage.
☐ Provide the signed **Referral Agreement, Epique's W9, and the CDA Instruction page** to Title.
☐ Maintain communication with the receiving agent and Title/Escrow through closing.

7–10 Days Prior to Closing:

☐ Request Commission Disbursement Authorization (CDA)
CDA Form: https://form.jotform.com/252708522568059
☐ Selecting "Referral Income" on section 12.
☐ Verify CDA is accurate and request any corrections, as needed.
☐ Upload completed CDA to WAdocs@epiquerealty.com.
☐ Verify the settlement statement reflects the correct referral amounts.
☐ Confirm that Title has proper disbursement instructions per the CDA and Referral Agreement.
☐ Title should submit Epique's portion of any commission payable to:

Epique Realty
16225 Park Ten Place, Suite 500
Houston TX 77084

Final Reminders:

- The broker is solely responsible for tracking their own referral agreements from execution through payment.
- The broker is responsible for ensuring every referral fee owed by Epique Realty in connection with the broker's transaction is disclosed, documented, reflected on the CDA, and paid at closing.
- If a referral fee is not paid at closing because the broker failed to disclose, document, or accurately report it, the broker is responsible for satisfying that obligation in full.
- The Company may recover the unpaid amount by offset or chargeback against the broker's current or future commissions, revenue share, or other amounts otherwise payable, consistent with the ICA.
- A CDA is still required even if an agent has capped or if Epique is not the closing brokerage.
- The referral obligation survives termination of the broker's affiliation with Epique Realty.

Commission Disbursement Instructions

This is your authorization to fund this transaction EXACTLY AS STATED.
All changes must be confirmed in writing.

Please call or email Epique Realty with any questions at:
(512) 387-0722 or CDA@EpiqueRealty.com

At close of sale, submit a fully executed settlement statement with Wire/Check confirmation to CDA@EpiqueRealty.com with the Agent's name and property address in the subject line.

Wire Instructions (preferred method): Payable To: Epique Realty | Tax ID #88-1190134 |
Wiring Info: Epique Inc. | ABA: 091311229 | ACCT: 202300764864 | Choice Financial Group

Check Payments: Make Payable To: Epique Realty
Include the Agent's name and property address on the memo line.
Include a fully executed settlement statement.

Mailing To: Epique Realty
16225 Park Ten Place
Suite 500
Houston, TX 77084