

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