

## Referral Agent Limitations

As a referral agent, you are extremely limited to your real estate activity, based on the Independent Contractor Agreement you signed when you joined our brokerage. Referral agents can ONLY refer their clients to full time Realtors® who will assist them with purchasing and selling. However, often times referral agents are employed by another real estate brokerage (key word: employed), as an office assistant, where their duties as an employee with that brokerage interfere with the limitations on being a Referral Agent with Metro Referrals. In this case, it is important to follow certain guidelines. In these examples, “unlicensed employee” is referring to the fact that the employee (you) is “unlicensed” with their employing brokerage because they are, instead, licensed with Metro Referrals. In the below guidelines, “licensee and supervising broker” refers to the licensee or supervising broker you are employed by, not Metro Referrals.

### An unlicensed employee MAY:

- Answer the telephone and forward calls to a licensee.
- Submit listings and changes to a multiple listing service.
- Follow up on loan commitments after a contract has been negotiated.
- Assemble documents for closing.
- Secure documents (public information) from courthouse, public utilities, etc.
- Have keys made for company listings.
- Write and place ads subject to the review and approval of licensee and supervising broker.
- Type contract forms at the direction of, and for approval by, licensee and supervising broker.
- Compute commission checks.
- Place signs on property.
- Arrange the date and time of home, termite, and well/septic inspection, mortgage application, pre- settlement walk-thru, and settlement.
- Prepare flyers and promotional information for approval by licensee and supervising broker.
- Act as courier service to deliver documents, pick up keys, etc.
- Schedule an open house.
- Schedule appointments for licensee to show listed property.
- Accompany a licensee to an open house or showing for security purposes or to hand out preprinted materials.

### An unlicensed employee MAY NOT:

- Prepare promotional materials or ads without the review and approval of licensee and supervising broker.
- Show property.
- Answer any questions on listings, title, financing, closing, etc.
- Discuss or explain a contract, listing, lease, agreement, or other real estate document with anyone outside the brokerage.
- Be paid on the basis of real estate activity, such as a percentage of commission, or any amount based on listings, sales, etc.
- Negotiate or agree to any commission, commission split, management fee, or referral fee on behalf of a licensee.
- Discuss the attributes or amenities of a property, under any circumstances, with a prospective purchaser or lessee.
- Discuss the terms and conditions of the real property offered for sale or lease with the owner of the property.
- Collect, receive, or hold deposit monies, rent, other monies, or anything else of value received from the owner or lessee of the real property or from a prospective purchaser or lessee.
- Provide owners of real property or prospective purchasers or lessees with any advice, recommendations, or suggestions as to the sale, purchase, exchange, or lease of real property to be listed or real property presently available for sale or for lease.
- Hold himself or herself out in any manner, orally or in writing, as being licensed or affiliated with a particular company or real estate broker as a licensee.
- Contact the public concerning the availability of real estate brokerage services unless an inquiry about a specific property is immediately referred to a licensee.