REALTY EZ

2026–27 EDITION

AGENT ONBOARDING

WELCOME TO REALTY EZ.

Everything you need for a fast, compliant start — systems, standards, checklists and who to call.

RealtyEz.net (239) 323-4167 Office@RealtyEz.com

GLAD YOU'RE HERE

LET'S GET YOU UP AND RUNNING.

You chose a brokerage that lets you keep what you earn and gives you the tools to earn more. This packet turns that into a plan for your first weeks with us.

Work through it in order. Each section ends with a checklist so you, your broker and our office are on the same page. If anything is unclear, call the office — that's what we're here for.

DAY 1
LICENSE TRANSFERRED

WEEK 1
PLATFORM LIVE

DAY 30
FIRST 90-DAY PLAN

INSIDE THIS GUIDE

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ONBOARDING

DAY-ONE SETUP

01

Get licensed, connected and visible on the right systems.

01 **Transfer your license**
Complete the DBPR change of brokerage. Your broker confirms the request in the state system; you're not authorized to practice with Realty EZ until it's approved.

02 **Update MLS & association**
Move your board and MLS membership so your listings, lockbox access and stats come with you.

03 **Sign your agreement**
Review and sign the independent contractor agreement and the office policies acknowledgment.

04 **Platform onboarding**
Activate your CRM, agent website and transaction management accounts and import your database.

05 **Brand assets**
Order business cards, sign riders and name badges. Submit your headshot and bio for your agent page.

DAY-ONE CHECKLIST

- [ ] DBPR transfer approved
- [ ] MLS / association transferred
- [ ] Independent contractor agreement signed
- [ ] W-9 and payment information on file
- [ ] CRM, website and transaction accounts active
- [ ] Headshot and bio submitted
- [ ] Added to agent roster and group chat

FLORIDA RULES

COMPLIANCE ESSENTIALS

02

A few rules protect your license, your clients and the brokerage. Know them cold.

Escrow deposits

Florida rules require a sales associate to deliver escrow funds received to the broker **no later than the end of the next business day**. When the brokerage holds the deposit, the broker must place it in escrow **by the end of the third business day** after the associate received it. When a title company or attorney holds the deposit, follow the contract's delivery deadline and get written confirmation of receipt.

Advertising

- Every ad, sign, post and website must include the **Realty EZ** brokerage name as registered — easy to see, not buried.
- Team or personal brand names cannot be larger than or confused with the brokerage name.
- Never advertise property without the owner's permission or a valid listing agreement.
- Avoid steering language. Describe the property, not the people who should live there.

Brokerage relationships

Florida presumes a **transaction broker** relationship unless another relationship is established in writing. Give required disclosures before or at the time of entering into a listing or representation agreement, or before showing property.

Files & submission deadlines

EVENT	SUBMIT TO THE OFFICE
Listing signed	Within 24 hours — listing agreement, disclosures, flood disclosure
Contract executed	Within 24 hours — full contract, addenda, escrow details
Escrow deposit received	By end of the next business day
Closing	Final settlement statement and any remaining documents

PLATFORM

YOUR TECH STACK

03

One platform for your whole business. Use it daily and it will run your follow-up for you.

CRM
Every contact, lead and past client in one place. Tag by source, set follow-up plans and run email and text campaigns.

Agent website
Your personal site with listings, lead capture and your story. Leads flow straight into your CRM.

Transaction management
Upload documents, track deadlines and watch your volume and commission reports build.

Forms & e-signature
Standard contracts and addenda ready to fill and send.

Marketing library
Social templates, postcards, business cards and the full client guide library.

Training portal
Recorded trainings, scripts and checklists available any time.

WIRE FRAUD

Never email wiring instructions yourself. Tell every client to verify instructions by phone with the title company at a number they look up independently.

WEEK-ONE TECH CHECKLIST

- [ ] Import your full database into the CRM
- [ ] Tag your top 50 relationships
- [ ] Turn on your new-lead follow-up plan
- [ ] Publish your agent website
- [ ] Upload any active listing or pending files

HABITS

WEEKLY RHYTHM

04

Consistency beats intensity. Here's the week our top agents run.

DAY	FOCUS
Monday	Weekly training · review pipeline · set showing and appointment goals
Tuesday	Prospecting block · past-client calls · listing follow-up
Wednesday	Sales meeting · market update · coach-and-solve
Thursday	Prospecting block · previews · marketing content
Friday	Seller updates · database touches · plan the weekend
Weekend	Open houses · showings · client events

TWO HOURS OF LEAD GENERATION A DAY, FIVE DAYS A WEEK. PROTECT IT LIKE A LISTING APPOINTMENT.

Your 90-day plan

CLOSED TRANSACTIONS GOAL _____

LISTINGS TAKEN GOAL _____

APPOINTMENTS PER WEEK _____

CONVERSATIONS PER DAY _____

OPEN HOUSES PER MONTH _____

DATABASE SIZE TODAY _____

YOUR LICENSE

05 CONTINUING EDUCATION & RENEWAL

Keep your license active and your knowledge current.

REQUIREMENT	DETAILS
Post-licensing (first renewal)	45 hours for sales associates; 60 hours for brokers
Continuing education	14 hours every 2-year renewal cycle
CE breakdown	3 hrs Core Law · 3 hrs Ethics & Business Practices · 8 hrs specialty
Renewal deadlines	March 31 or September 30, depending on your license cycle

PLAN IT NOW

Put your renewal date and course plan in your calendar during onboarding. Missing post-licensing makes a sales associate's license null and void.

Notes

SUPPORT

WHO TO CALL

06

NEED HELP WITH…	CONTACT
Contracts, negotiations, compliance	Broker support — call or text the office line
Platform access & tech	Office — tech onboarding
Marketing materials & templates	Office — marketing requests
File submission & commission	Office — transaction coordination
Trusted vendors	Preferred vendor list in your platform

BROKER OF RECORD _____ OFFICE LINE _____

OFFICE EMAIL _____ MY MLS ID _____

MY LICENSE # _____ RENEWAL DATE _____

OFFICE

(239) 323-4167 · Office@RealtyEz.com

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WELCOME TO THE TEAM.

Questions during onboarding? Call or email the office — we'll get you answered fast.

CALL / TEXT	(239) 323-4167
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