



AGENT TRAINING

Sunday, January 9th 2022

12:50pm – 2:20pm

Brookglen Community Center in La Porte

AGENDA

12:50pm – Lunch Self Serve from Mamma Mia's

1:00pm – Introduction of Agents

1:10pm – Updates to our Policies & Procedures Manual

1:30pm – Dotloop Transition

1:45pm – Top things to remember to do (or not do)

2:00pm - 2022 Homestead Exemption reminders

2:03pm – Marketing Yourself in 2022

2:08pm – Recognition of Agent Production

2:13pm – Independent Contractor Agreement & Statement of Understanding

2:15pm – Questions / Concerns

12:50pm

LUNCH

Please grab a plate when you arrive and help yourself to the food from Mamma Mia's Pizza and Pasta (the owners are clients of ours). The meeting will begin at 1:00pm

1:00pm

Introduction of Agents

Please take 30-60 seconds to briefly introduce yourself to the other agents

How long have you been an agent? What area do you live in and focus on? Personal Information you want to share?

Sylvia Skotak

Vince Kearney

Weiye Shi

Maria Ramirez

Kelly Mooney Yates

Ashley Marcum

Jerrice Bridges

Alma Hernandez

Bruce Carter

Maryam Karimian

Jeremy Ellison

Sharon Ellison

Yesenia Iniesta

1:10pm

Updates to the Policies & Procedures Manual for 2022

- 1) You must offer at least 2.5% as a Co-Op fee to buyers agents on MLS.
- 2) If you offer a rebate/contribution to your client it must be shown on the CDA and disclosed on the Final CD
- 3) If you represent the Buyer and the Seller in the same transaction the broker will APPOINT another San Jacinto Properties agent to advise the BUYER in the transaction (Intermediary With Appointments). The APPOINTED agent will receive 10% of the commission, Listing Agent 85%, and the Broker 5%
- 4) Agents are required to use Dotloop folders for each client/transaction and add the Broker access to the folder. If you need training on Dotloop there are many YouTube videos that are available for tutorials. All contracts and addenda concerning the transaction must be loaded into the folder so the Broker can see and review them.
- 5) The MINIMUM commission/fee to the Broker on any transaction is \$99. This includes leases and vacant land as well
- 6) Your CDA must be sent to the Broker a minimum of 72 hours prior to closing (5-7 days is recommended). Be sure you have calculated the commission correctly based on the sales price and any amendments. Any errors in the math will be deducted from your commission.
- 7) Agents MUST use either ShowingTime.com or HAR's ShowingSmart for all listings. DO NOT list your phone number as the appointment number.
- 8) Agents are NOT PERMITTED to do Property Management (even on their own property). You can do leases, but no property management duties. All Property Management is done by the Broker or the designated Property Manager (currently Sylvia Skotak)
- 9) All agents agree to take AT LEAST one Continuing Education class every 6 months
- 10) Agents will receive an end of year spreadsheet from the broker with all of their transactions and commissions. You will not receive a 1099 from the Broker. It is your responsibility to correctly report your income to the IRS
- 11) Agents MUST use the CHECKLISTS provided on the AGENTS ONLY web page. There is a LISTING CHECKLIST, SELLER CHECKLIST, and BUYER CHECKLIST. Include your Checklists in Dotloop and send them to me with your CDA so I can see you have completed all the steps
- 12) If you have a question about a form or contract, ASK ME. There are sample contracts & video tutorials on our [Agents Only page](#)

1:30pm

Dotloop

Dotloop.com is included with your HAR membership. Just log in (or create an account) and start creating folders for each transaction (similar to ZipForms). Be sure to ADD me to the folder so I can access the files in case there is a question or issue I need to address. There are numerous video tutorials on YouTube that explain how to use Dotloop if you need help

<https://youtu.be/9Je9sm6cHHg> <https://youtu.be/JH32aQobyJU> <https://youtu.be/E7mq4sUxOwo>

<https://youtu.be/NWPLvMniJcM> Here are 4 videos to help you

The screenshot shows the Dotloop dashboard for the Houston Association of Realtors. It features a search bar at the top, a grid of property listings, and various filters and sorting options. Each listing card includes a house icon, address, type, status, listing price, and creation date. Some cards also have 'Enter Closing' or 'Archive' buttons.

Address	Type	Status	Listing Price	Created
4214 Armand View Drive, Pasadena, TX 77505	Listing for Sale	Active Listing	\$314,900	11/11/2021, 1:55 PM
3311 Somerton dr, La Porte, TX 77571	Listing for Sale	Active Listing	\$219,000	07/17/2021, 9:13 AM
1818 Gaucho cir, La Porte, TX 77571	Listing for Sale	Active Listing	\$232,500	06/08/2021, 6:59 PM
Mario Duran	None			06/01/2021, 3:04 PM
2637 Sawyer dr, Seabrook, TX 77586	None			04/15/2021, 5:20 PM
9907 Toulouse Avenue, Baytown TX 77521	None			04/12/2021, 9:07 PM
RESALE - 7 Tree Crest Cir, Spring, TX 77381	None			04/10/2021, 9:08 PM
2902 Autumn Creek Drive, Friendswood TX 77546	None			04/02/2021, 11:05 AM
3203 Crescent Bay dr, League City, TX 77573	None			03/27/2021, 7:50 PM
406 Magnolia Estates Dr, League City, TX 77573, USA	None			03/25/2021, 10:14 PM
2122 W Crimson Lake Lane, League City TX 77573	None			03/16/2021, 4:05 PM
313 East Wilkins Street, League City, TX, USA	None			03/15/2021, 1:58 PM
123 Lake Point Drive, League City TX 77573	None			03/13/2021, 4:09 PM
15707 Bowsprit Lane, Houston, TX	None			02/03/2021, 11:04 AM
Lease-Tenant/Orellana/2020	None			02/01/2021, 7:53 PM
31303 Sunset Oaks Ln, Spring, T...	Listing for Sale	None		
2907 Paisley Meadow Drive, Leag...	None			01/20/2021, 4:05 PM
1401 McPhail Road, Baytown, TX...	None			01/14/2021, 8:03 PM

The screenshot shows the 'Add documents' modal in the Dotloop interface. The modal is titled 'Add documents' and has a sub-section for 'Add person'. The 'Add person' form includes fields for 'FULL NAME' and 'EMAIL', and a 'ROLE' dropdown menu. There is also a checkbox for 'Add to my team' and a 'Send intro email' checkbox. A blue 'ADD PERSON' button is at the bottom right. The background shows a property listing for '4214 Armand View Drive, Pasadena, TX 77505'.

1:45pm

Top Things to Remember to Do (or Not Do)

- 1) Create a Dotloop folder as soon as you have a client and start uploading/saving the contracts/addenda/forms into the folder. Add the Broker so I can access the folder/files
- 2) San Jacinto Properties Agents cannot do Commercial Real Estate transactions (you can refer it out and get a referral fee)
- 3) San Jacinto Properties agents cannot do Property Management. You CAN do leases, but remember the minimum fee to the Broker is \$99 on any transaction
- 4) Once an agent has reached the \$5000 mark in commissions to the BROKER each year, all remaining transactions for the calendar year are only \$99. We do not have any monthly/annual fees or quotas. Keep up with your transactions and how much you have contributed.
- 5) It is the agent's responsibility to know which contracts/addenda/forms to use on each transaction and to ensure they are included and signed by all parties and loaded into the Dotloop folder. If the other agent has forgotten to include a form, then you do it. Make sure all parties have a copy of every form. Don't assume the other agent sent it to the title company or the lender. Make sure every form is SIGNED and the contract has an EXECUTION DATE on it. Upload your disclosures into MLS in advance (Seller's Disclosure, Lead based Paint Addendum, Survey/T-47, MUD Disclosure, etc)
- 6) Never put a sign in a yard or advertise a property without a signed Listing Agreement in place
- 7) You can use the TXR or the San Jacinto Properties Buyer Representation Agreement form, but be sure you have one in place before you submit an offer on any property. Do not include the Buyer Rep Agreement with offers, it is for our record only.
- 8) Be sure you are using the correct contracts/addenda/forms and that you know how to fill them out correctly. If you aren't sure, ask me for help. I prefer if you TEXT me if you need me since I check text messages much more frequently than I do emails. I will respond to you as soon as I can. I teach classes every morning before Noon and I have my own clients to deal with in the evenings, so it may take me a few hours to respond. If I don't respond within 12 hours, please text me again and remind me
- 9) If you are the Listing Agent, be sure to enter the information into the MLS in a timely manner and update it when needed. Don't leave information out that should be there. Check your spelling. Proofread the listing before AND after you post it to see if you missed something. Upload all the necessary disclosures & instructions. Use Agent Remarks to communicate details to the other agents

2:00pm

2022 Homestead Exemptions

Be sure you send an email out to every client that BOUGHT a house this year and remind them to file for their Homestead Exemption (assuming that the home is their Primary Residence and not Investment Property)

Here are the links to the area counties and how to file. Send your client the link for their county and remind them that their Drivers License must match the property address or they will not accept the Homestead Application

Harris County: <https://hcad.org/hcad-online-services/homestead/>

Galveston County: <https://form.platoforms.com/fracsaubwu2/>

Brazoria County: <https://www.brazoriacad.org/exemptions.html>

Chambers County: <http://www.chamberscad.org/forms.htm>

Ft. Bend County: <https://www.fbcad.org/homestead-exemptions/>

Montgomery County: <https://forms.mcad-tx.org/#/a/form/HomesteadExemption/new>

****** Beginning January 1st, 2022 Buyers will be able to file for a Homestead Exemption the same year they buy the home and not have to wait until the following year******

2:03pm

Marketing Yourself in 2022

I strongly encourage you to make a conscious effort to set up a monthly marketing plan for yourself in 2022. Even if real estate is your 2nd or side career, all of us are happy when we get those closing commission checks. Set a goal to have at least 1 more closing this year (or more) and have a plan to reach that goal by marketing yourself at least once a month.

Social Media: remind friends and family that you are a Realtor. Post when you have a new listing or a closing. Post a random real estate meme. Post a new head shot photo and remind people you are an agent. Post photos from open houses, pay for targeted advertising on sites like facebook (it's not that expensive)

Email: Send out a personal email to friends and family telling them Happy Birthday, Congratulations, etc and include your Realtor signature / photo / logo at the end. It's a subtle way to remind them you are a Realtor

Display your Branding: Wear your name tag, put your advertising magnets on your car doors or back window, have custom yard signs made, send out postcards to everyone within 2 miles of your home

Sponsor Events: Sponsor events or teams that will include your banner/logo at their event or on their jerseys. Set up a table at craft shows or festivals and give away marketing items like the ones in your bag today.

Be Seen: Attend area events and Realtor functions so people get to know you and see your face (out of sight , out of mind)

Be Safe: You can now Download the FREE *SafeShowings* safety App to protect yourself during showings and open houses

2:08pm



Recognition of Agent Production in 2021



TOP 5 AGENTS

Number of Total Transactions

#1 Jeremy Ellison & Kelly Mooney Yates (**11 Transactions**)

#3 Weiye Shi (**9 Transactions**)

#4 Jerrice Bridges & Alma Hernandez(**6 Transactions**)

Total Commissions

#1 Jeremy Ellison

#2 Kelly Mooney Yates

#3 Jerrice Bridges

#4 Ashley Marcum

#5 Weiye Shi

Highest Sales Price

#1 Kelly Mooney Yates (**\$845,000**)

#2 Kelly Mooney Yates (**\$537,000**)

#3 Jeremy Ellison (**\$515,000**)

#4 Kelly Mooney Yates (**\$475,000**)

#5 Kelly Mooney Yates (**\$440,000**)

2:13pm

Independent Contractor Agreement & Statement of Understanding

Please complete your Independent Contractor Agreement, initial/sign and date it and return it to me before you leave today. I will scan it and send it back to you within 24 hours



INDEPENDENT CONTRACTOR AGREEMENT FOR SALES ASSOCIATE

USE OF THIS FORM BY PERSONS WHO ARE NOT MEMBERS OF THE TEXAS ASSOCIATION OF REALTORS®, INC. IS NOT AUTHORIZED.
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1. **PARTIES.** The parties to this agreement are:
 Broker: San Jacinto Properties; and
 Associate: _____
2. **TERM:** This agreement commences on January 1, 2022 (Commencement Date) and ends at such time as either party terminates this agreement in accordance with Paragraph 21.
3. **DEFINITIONS:**
- A. "Brokerage services" means assistance and services to prospects that are reasonably necessary to negotiate and bring about the successful closing of transactions for the sale, purchase, or lease of real estate.
 - B. "Files" means any documents, instruments, contracts, written agreements, disclosures, memoranda, books, publications, records, correspondence, reports, data, lists, compilations, studies, surveys, images, and all other data, whether in written or electronic format, which are related to Broker's real estate business. The term "files" includes excludes Associate's prospect lists.
 - C. "Prospect" means: (1) a buyer, prospective buyer, seller, prospective seller, landlord, prospective landlord, tenant, or prospective tenant of real estate; or (2) a client or customer of Broker or Associate.
 - D. "Real estate business" means all business related to the acts of a real estate broker as defined by Section 1101.002, Occupations Code (the Real Estate License Act).
4. **BEST EFFORTS:** Associate will use Associate's best professional efforts to:
 A. solicit listings and prospects for Broker's real estate business; and
 B. provide brokerage services to prospects procured by or assigned to Associate.
5. **EXCLUSIVE ASSOCIATION:** Associate will perform the services contemplated by this agreement exclusively for Broker. Associate may not engage in the brokerage of businesses or in the management of property without Broker's knowledge and written consent.
6. **LEGAL AND ETHICAL COMPLIANCE:** When delivering brokerage services to prospects and when otherwise performing under this agreement, the parties agree to comply with all applicable laws and standards of practice, including but not limited to the Real Estate License Act, the Rules of the Texas Real Estate Commission, the Code of Ethics of the National Association of REALTORS®, the bylaws of the national, state, and applicable local associations of REALTORS®, any rules and regulations of any listing services to which the parties may subscribe, and any standards or policies Broker adopts.
7. **LICENSES AND TRADE ASSOCIATIONS:**
- A. **Broker's License and Membership Status:** Broker is a licensed real estate broker in the State of Texas and is a member of the National Association of REALTORS®, Texas REALTORS®, and the following local associations of REALTORS®: Houston Association of Realtors. Broker will maintain Broker's license and REALTOR® membership status active and in good standing at all times while this agreement is in effect.



STATEMENT OF UNDERSTANDING

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It is suggested that this statement be executed annually.

CONCERNING THE INDEPENDENT CONTRACTOR AGREEMENT BETWEEN

San Jacinto Properties (Broker)
and

(Associate)

I, the above-named Associate, state as follows:

- (1) I am a broker salesperson duly licensed in the State of Texas and am affiliated as an independent contractor with the above-named Broker.
- (2) I have paid all my own license fees and membership dues required under the Independent Contractor Agreement with Broker and have not received reimbursement from Broker.
- (3) I have paid all of my own automobile and transportation expenses and have not received reimbursement from Broker.
- (4) I have paid all entertainment and other incidental expenses in connection with soliciting listings and procuring prospects and have not received reimbursement from Broker.
- (5) Broker has not required me to maintain any specific schedule.
- (6) I have not had to consult with Broker regarding scheduling of my vacations or working hours.
- (7) I have received no salary or sick pay and I am compensated on a commission basis.
- (8) I have paid my own income and FICA taxes.
- (9) My association with Broker may be terminated by either party at any time upon notice given to the other party; but the rights of the parties to any fees which accrued before termination are not divested by the termination.

Associate Date

2:15pm

Questions / Clean Up

If you have any questions / concerns / suggestions, now is the time to ask

Please be sure to dispose of your plates, cups and trash into the trash can and stack the black chairs in the storage room behind the kitchen. Help break down and fold your table and store it back in the storage room behind the kitchen. We have to be out of the building by 2:30pm. Thank You!

**Thank You All For
Attending Today**

