



AGENT HANDBOOK

A Guideline to Working at Weichert Realtors - Cornerstone
©2025



CONGRATULATIONS ON JOINING OUR TEAM!

At Weichert Realtors® | Cornerstone, our mission is to provide exceptional real estate services across Pennsylvania (Bucks County, Chester County, Delaware County, Montgomery County) and Wilmington, Delaware, and beyond. As a full-service brokerage, we are dedicated to helping clients navigate the complexities of the real estate market with expertise, personalized care, and unwavering commitment to customer satisfaction.

Our experienced team offers a comprehensive range of services, from buying and selling homes to providing expert market insights and support at every stage of the real estate journey. Whether you're a first-time homebuyer, an experienced investor, or looking to sell your property, we leverage our tools, knowledge, and local expertise to help you achieve your goals.

We pride ourselves on fostering a collaborative and supportive environment for both our clients and agents. With a focus on professional development, cutting-edge technology, and staying ahead of market trends, we are continually expanding our offices and teams to maintain our position as an industry leader.

This handbook is designed to familiarize you with our policies, procedures, and best practices, serving as a guide to help you make the most of the resources we offer. At Weichert Realtors® | Cornerstone, success is not just about selling real estate—it's about building relationships, fostering trust, and growing both professionally and personally. Welcome to the Cornerstone family.

Together, we'll achieve great things!





Weichert
REALTORS® Cornerstone

A MESSAGE FROM NICK

Welcome to Weichert Realtors® | Cornerstone!

I'm thrilled to have you join our team. At Cornerstone, we are more than a real estate brokerage—we're a family united by a shared commitment to excellence, collaboration, and professional growth.

Our mission is to provide you with the tools, training, and support you need to thrive in your career. From cutting-edge technology to ongoing mentorship and education, we are here to empower your success in today's dynamic real estate market.

Collaboration is the cornerstone of our culture. Across our offices, you'll find a team that is always ready to share insights, offer guidance, and celebrate your achievements. Together, we create an environment where everyone can succeed.

I can't wait to see what you will accomplish as part of our family. My door is always open, so don't hesitate to reach out for support or advice. Here's to a future of shared success and great achievements!

Nick Boscaino

PRESIDENT AND BROKER/OWNER



First Steps to Becoming a REALTOR®

1. **Join the National Association of REALTORS® through your local association:**
 - a. **Bucks County Agents** → [Bucks County Association of Realtors® \(BCAR\)](#)
 - b. **Chester, Delaware & Montgomery County Agents** → [Tri-County Suburban Realtors®](#)
 - c. **Wilmington, DE Agents** → New Castle County Board of Realtors® (NCCBOR)
2. **Obtain your NRDS Number**

Once your application is approved, you'll receive an **NRDS #**. You'll need this number to:

 - a. Join **Bright MLS** → <https://www.brightmls.com/dashboard>
 - b. Log into your **myWeichert CRM**
3. **Complete Weichert® | Fast Track Training**

Agents are required to take **Weichert® | Fast Track** within the first 30 days of joining Weichert Realtors® | Cornerstone. This comprehensive sales training is designed to launch YOUR real estate business.

 - a. **Cost:** \$169
 - b. **Reimbursement:** Complete 3 sales transactions (excluding rentals) while your license is active with Weichert Realtors® | Cornerstone, and we will reimburse your Fast Track cost.
 - c. **Register here:** [Weichert® Fast Track Training](#)

This is the beginning of an exciting journey, and we are honored to be part of your success!

Onboarding Checklist ✓



Agent TO DO Week One

	Assigned	Date Complete
Hire Package Complete	Manager	
Agent Selected WR Cornerstone as Broker in PALS	Agent	
Order Business Cards & Name Tag - Agent Support	Support	
Initial One on One Coaching	Manager	
Join/Register for Weichert Fast Track and/or Success Track	Agent	
Take Testimonial ("Why Weichert?") - For social Media	Agent	
Agent to Schedule Meeting with MTS	Agent	
Agent to Provide Headshot - to Agent Support	Agent	
Agent to Explore Weichert University Training Moduals	Agent/MTS	
Locate your Mailbox	Agent/Manager	
Meet with Assured Financial Mortgage Advisor	Agent	
Maintain a Calendar of Sales Meetings Dates/Times & Training Sessions	Agent	
Office Tour	Manager	

Agent TO DO - Week Two

	Date Assigned	Date Complete
Check for State License Activation	Agent/Manager	
Set up your My Weichert Account	Agent/MTS	
Explore Weichert University Training Sessions	Agent	
Log into Broker Mint Transaction Software	Agent	
Set up Database Sphere of Influence	Agent/MTS	
Listing Presentation - Set Up Personalized Template	Agent/MTS	
Share Resource for Professional Photography for Listings	Coach	
Attend Office Sales Meeting	Agent	
Shadow Coach - Listing Presentation, Open House, Buyer Presentation	Agent	
Sign up for Tri-County Association of Realtors Orientation	Agent/Manager	
Sign up for Bright MLS & Showing Time	Agent/Manager	

Agent to Set Up myWeichert®	Agent/MTS	
Tech Check	Assigned	Date Complete
<i>Confirm Agent has access, they've got a complete profile set up & know how to use</i>		
Connect Laptop to Company Internet	MTS	
Set-up Professional Email & Signature Line (G-Mail Preferred)	Agent/MTS	
Set-up Your Professional Voicemail on Office/Cell Phone	Agent	
Set up Agent Web Page in My Weichert	MTS	
Set up My Weichert	MTS	
Install Weichert Apps	Agent/MTS	
Review Important Work Websites	Agent	
Find Weichert Logos in Weichert Tools	Agent/MTS	
Connect to Office Printer	Agent/Support	
Weichert Systems & Profiles		
<i>Confirm Agent can login, has a complete profile and give them a tour of the content.</i>		
Tour of Tools	MTS	
myWeichert	MTS	
Weichert Tools	MTS	
Weichert University	MTS	
David Knox Training - Weichert University (login with email, pw=firstinitial.last name)	Agent	
myMarketing Studio	MTS	
Quantum/Lead Link Account for Just Listed Cards (login with email, pw=last name)	MTS	
Approved Suppliers	MTS	
myWeichert Orientation		
<i>Explain & Demonstrate All (or take a Quickstart Series video)</i>		

Bio/Profile/Photo - Check up	Agent/MTS	
Website Settings/Customizations	MTS	
SOI Import/Contacts Add	Agent/MTS	
Filters/Hash Tags/Status	Agent/MTS	
How to Call, Email & Text Using the System	MTS	
Activity Dashboard	MTS	
Smart Campaigns/Behavioral Automation	MTS	
Market Reports/Home Valuations/Search Alerts	MTS	
Landing Pages	MTS	
Squeeze Pages	MTS	
Promoting a Listing Playbook	MTS	
Testimonials	MTS	
Weichert Design Store Center	MTS	
Daily Routine/Lead Pipeline	Coach	
Find Quickstart Series in Weichert Tools		

3rd Party Profiles	Assigned	Date Complete
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<i>Help them set up or update COMPLETE profile to your brand, as applicable</i>		
Realtor.com	Agent	
Homes.com	Agent	
Zillow	Agent	
Google Business Page	Agent	
Facebook Business Page	Agent	
Instagram, LinkedIn Youtube, etc.	Agent	
WREA Sales Professionals Page (closed WREA group on FB)	Agent	
RPR Account (NAR)	Agent	

Prep for Client Meetings/Training	Assigned	Date Complete
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Review Fast Track Assignments (if applicable)	Coach	
Business Planning/Review Award Tiers	Manager	

Train on Sales Contract/Disclosures	Roundtbl/Coach	
Train on Listing Agreement/Disclosures	Roundtbl/Coach	
Doors - How to Create & Present: Pre-Listing Pkg, Getting to Know You, Presentation, PTA	Roundtbl/Coach	
Buyer Consultation - How to Create and Present	Roundtbl/Coach	
Open House Program	Coach	
Seller Scripts	WU	
Buyer Scripts	WU	
Ready to Launch		
	Assigned	Date Complete
SOI uploaded	Agent	
Welcome to the Team Announcement on Social	Support	
myWeichert Announcement to SOI	Agent	
Create and post I'm With Weichert Social Media Post	Agent	
Create and purchase Agent Banner Stand	Agent	
Create & send Direct Mail Announcement - I'm with Weichert - to SOI	Agent	
Create & send Direct Mail Announcement to Farm Area	Agent	
Schedule an Open House w/ Exp. Agent	Agent	
Order name riders/personal signs (if applicable)	Agent	
Associate Signature	Date	
Manager Signature	Date	

Budget to Become a REALTOR®

General:

- **MLS - Bright Dues:** \$120.00 quarterly (initial joining fee: \$270.00)
- **Errors & Omissions Insurance:** \$250.00 annually (subject to change)

Pennsylvania Agents:

1. Real Estate License Course & Education:

- 75-Hour Salesperson Pre-Licensing Course: \$500.00 – \$800.00 (depending on the package)
- Continuing Education (14 Hours, required every 2 years on even-numbered years): \$100+

2. Pennsylvania Real Estate License:

- New Salesperson License: \$150.00
- Renewal Fee (every 2 years): \$75.00

3. REALTOR® Association Memberships:

Includes the Local for your county, Pennsylvania Association of REALTORS® (PAR), and National Association of REALTORS® (NAR)

- Tri-County Suburban REALTORS® (Delaware, Chester, Montgomery Counties)
 - Initial Fee: \$250.00
 - Annual Membership: \$575.00
- Bucks County Association of REALTORS® (Bucks County)
 - Call for fees

Delaware Agents:

1. Real Estate License Course & Education:

- 99-Hour Salesperson Pre-Licensing Course: \$500.00 – \$800.00
- Continuing Education (21 Hours, every 2 years): \$249.00 – \$325.00

2. Delaware Professional Regulations License (DPR):

- New Salesperson License: \$149.00
- Renewal Fee (every 2 years): \$140.00

3. REALTOR® Association Memberships (Choose One Primary Association):

- **Sussex County – Primary**
 - Sussex County Association of REALTORS® (SCAOR)
 - Initial Fee: \$250.00
 - Annual Membership: \$290.00
- **Kent County – Primary**
 - Kent County Association of REALTORS® (KCAR)
 - Initial Fee: \$250.00
 - Annual Membership: \$240.00
- **New Castle County – Primary**
 - New Castle County Association of REALTORS® (NCCAR)
 - Initial Fee: \$200.00
 - Annual Membership: \$220.00

State and National Associates Required for all DE Agents:

- Delaware Association of REALTORS® (DAR)
 - Initial Fee: \$125.00
 - Annual Membership: \$200.00
 - National Association of REALTORS® (NAR) - Annual Membership: \$156.00

Maryland Agents:

1. Real Estate License Course & Education:

- 60-Hour Salesperson Pre-Licensing Course: \$209.00 – \$480.00
- Continuing Education (15 Hours, required every 2 years): \$249.00 – \$326.00

2. Maryland Department of Labor – Real Estate License (DLLR):

- New Salesperson License: \$91.00
- Renewal Fee (every 2 years): \$78.00

3. REALTOR® Association Memberships (Worcester County – Primary):

- Coastal Association of REALTORS® (CAR)
 - Initial Fee: \$225.00
 - Annual Membership: \$315.00
- Maryland Association of REALTORS® (MAR)
 - Initial Fee: \$125.00
 - Annual Membership: \$232.00
- National Association of REALTORS® (NAR)
 - Annual Membership: \$156.00



Welcome to Weichert Realtors® - Cornerstone!

We are excited and pleased that you have affiliated with our growing team. Our experience shows that a clear track to run on will help ensure your success in this business and with our company. Part of this track is reaching agreement on a number of items. All of our sales associates receive this letter upon hiring, and we have found that questions, concerns, and problems are alleviated and minimized through this clear communication.

Professional Development

FAST TRACK

"Fast Track" is our training program for our Sales Associates. It is designed to bring you into production quickly. We expect your full cooperation and attention in attending scheduled training sessions and in completing this dynamic and useful curriculum. There is much technical and practical information to be learned, and our Fast Track Training Program will focus on these as well. Following are some of the main topics that will be covered:

- Introduction to Weichert
- Finding and Working with Sellers
- For Sale by Owners
- Expired Listings
- DOORS (Our Listing and Marketing Presentation)
- Pricing Properties Properly
- Price Trend Analysis
- Absorption Rates
- Marketing Listings
- Finding and Working with Buyers
- Making the Sale
- Contracts

<https://www.eventbrite.com/o/weichert-real-estate-affiliates-inc-10940787138>

ON-GOING DEVELOPMENT PROGRAMS

On a regular basis, we offer career development opportunities designed for all agents with all levels of experience. This business is ever-changing, and it is important to keep up with new trends, changes in laws governing our business, and new profit-making techniques.

Depending on the subject matter being covered, your attendance may be required. However, as a rule, sales associates will have the option to attend any or all scheduled sessions, campaigns, and workshops.

BUSINESS MEETINGS

The meeting is designed to be motivational, educational, and fun! Because of the important and timely content, your attendance is expected, and you should schedule all personal and business activities so as not to conflict with this monthly meeting. Business meetings are held on a monthly basis at each of our offices. Plan to attend your assigned office meeting. Check with your manager on the time and dates.

GOAL SETTING

Personal production goals are the driving force behind your business plan. They should be written and reviewed regularly for progress against them. Management will work with you to formulate realistic goals upon your initial association with our company and will review them at regular intervals to determine your level of success. You will have the opportunity to participate in our annual planning day as the New Year approaches. This motivational day will assist you in establishing your yearly production goals, and your participation is expected.

ACTIVITIES AND PRODUCTION STANDARDS

Activities: Although there will be opportunities for you to work leads generated by the company, your continued success will only be assured by maintaining a set of business-building activities. Management will work with you to design a customized activities plan, but at minimum, the following are expected from each of our sales associates:

- Send out 250 direct mail pieces each month
- Use the 3-step, 2-visit Weichert listing system, including the customized DOORS portfolio, with every listing presentation
- Complete the "Getting to Know You" brochure on the first visit and the Price Trend Analysis on the second visit of every listing
- Conduct a minimum of 2 Open Houses per month (3 for new associates until first 2 closings) and display 8 directional signs per house
- Call attendees within 24 hours
- Call a minimum of 100 neighborhood homes weekly (200 calls for new associates). Call more if an appointment is not secured.

Production: Allowing non-productive sales associates in our organization would affect everyone negatively. Only productive sales associates remain sharp enough in their skills to provide the quality service our customers expect and deserve. Considering the team nature of our organization, allowing unhappy customers to pass through our doors hurts the image and opportunities of both the company and its individual agents. The company and its sales agents, therefore, must set and meet production and profit goals. For these reasons, we expect every Weichert Realtors® - Cornerstone sales associate to maintain a production level of a minimum of \$11,000 GCI or 2 closed sides per quarter.

PERFORMANCE REVIEWS

Periodically, we will work together to review your goals and success in reaching these goals. This is an opportunity for collaboration and discovery. If you are not on track, our management team can help. We will not let you flounder and set you up for failure. Our interests are best served by your success, and we will share tried and true systems proven to keep you producing at a high level. If you are willing to take the suggestions and constructive criticisms in the spirit of cooperation in which they are offered, only mutual success will result.



SALES ASSOCIATES: Management will periodically meet with new sales associates to ensure all the activity goals that ensure your success are met.

PROFESSIONALISM

Your appearance, attire, work area, and transportation reflect upon you and our company. We pride ourselves on our professional image in the marketplace. Your ability to look like a successful professional will open doors that will otherwise close and, quite possibly, remain closed throughout your career as a result of only one lost chance at making a good first impression.

In addition to physical appearance, we pride ourselves in putting the customer at the top of our priority ladder. In all encounters, we expect Weichert Realtors® - Cornerstone sales associates to put the needs of the consumer first and to treat them with the dignity and respect they deserve.

This letter is an introduction to the high standards we have developed to ensure that our company maintains the highest level of professionalism. You need to review our complete set of policies and procedures found in your New Sales Associate Onboarding Guide.

Again, welcome to our Weichert Realtors® - Cornerstone family!



COMMISSION PLAN - All WRC Agents Receive the Below at No Cost:

- Agent Page on Company Websites
- Marketing Materials & Brochures
- Agent Website W/CRM
- Sales Meetings weekly
- Doors TM Listing Presentations
- 24/7 Office Access with no desk fees
- Free printing/copying from office copier
- Open House signs/balloons
- Name Badge
- Company-paid Open House Advertising
- Business Cards (1st 250 cards)
- Full Administrative Support
- Listings & Selling contract documents
- Marketing Technology Support (MTS)
- In-office Tech Training
- In-office Lunch and Learns
- Mentoring by Agents/Manager/Broker
- Weichert Realtors training, systems, tutorials, mentoring, & more
- MyWeichert, Weichert One, Weichert Works transaction Management & Weichert University



Cornerstone

Module 1

Welcome |

First Things First

Module 1 – Priorities

1. You will receive a welcome email from the Weichert Cornerstone Support Team with your log in credentials. All Weichert systems can be accessed through my.weichert.com, with SINGLE SIGN on credentials. If you can't find the email, contact Support at support@weichertcr.com.
2. Register for Fast Track as soon as possible. Ask your manager/mentor for the next available date or find it here: [Weichert® Fast Track Training](#)

Welcome to Weichert, Realtors – Cornerstone

We are pleased and excited that you have chosen our team at Weichert, Realtors®-Cornerstone. We hope that one of the reasons you joined Weichert is because you learned about our strong commitment to the training of our Associates to ensure profitability and success.

You are in a unique position of opening a business within a business. We are here to help and guide you, but ultimately your success is up to you.

If you are waiting for your license, there are activities and trainings in which you may participate, to acclimate yourself to real estate and familiarize you with some of the Weichert tools. Until you are a licensed real estate professional, you CANNOT participate in prospecting or sales activities, but we hope you will spend your time on the activities listed below, to build the foundation for your new real estate business.

Activities to begin while waiting for your license

Build a Sphere of Influence Database

This list includes family, friends, former co-workers, and anyone else in your private, or previous, business life, NO MATTER where they live. Our business is based on referrals!

- Start with your personal email account and prepare a CSV file to import into *myWeichert* CRM, when you have access.
- Ask your manager/mentor to provide the following resources from Weichert University, ***myWeichert Resources*** to get you started:
- You will use this list to connect with your sphere of influence. Continue to build the contact record.
- Select a “farm” area and LEARN IT... schools, parks, transportation, etc.

- Familiarize yourself with Weichertcr.com.
 - Search for Weichert listings in your market area to learn the inventory,
 - Search for “Just Listed” properties from your office.
- Complete your Bio page in your *myWeichert* profile. Reference Module 2 in Onboarding Guide.
- Get a professional headshot and turn this into the office. See Module 2 in Onboarding Guide.
- Announce on your social media sites that you have joined Weichert, Realtors – Cornerstone
- Download the recommended business apps to your phone. See Module 2 in Onboarding Guide.
- Ask your Manager/Mentor for opportunities to shadow other agents at Open Houses.

We are serious about your training. Please work through these modules thoroughly and timely. These activities will make sure that you enjoy a smooth transition into our company.

Our team is here to help you. Remember to have some fun along the way and always feel free to ask our team questions.

Again, welcome aboard!



Core Values

1. Demonstrating **Integrity** in all our dealings
2. Maintaining **Professional Standards** with clients and colleagues alike
3. Creating **Added Value**: "We Sell More Because We Do More"
4. Providing **Personal Service** through responsiveness and attention to detail: "We Do What We Say We'll Do"
5. Building **Relationships For Life** through constant follow-up

Each Weichert® franchised office is independently owned and operated.

How Weichert® Spells S.U.C.C.E.S.S.

Spend time on self improvement; attend sales meetings, call sessions, training and role play with a buddy.

Use our proven, 2-step process on every Listing Presentation. Always complete the *Getting to Know You* brochure on the first step and DOORS and the Price Trend Analysis on the second step.

Conduct a minimum of 2 Open Houses per month and display 8 directional signs per house.

3 Open Houses each month for new Associates. Use our Open House App to capture attendee info and ensure they get automated follow-ups.

Call a minimum of 100 neighborhood homes weekly. A minimum of 200 calls for new Associates; use the Weichert Calling Dialogue & Follow Up Guide.

Enter a minimum of 4 new contacts into your myWeichert database weekly. Target 40 touches annually to each via calls, texts, social media, email, drip campaigns, direct mail and drop-ins.

Send out at least 250 direct mail pieces every month. Follow up with phone calls.

Secure business by using our other exclusive Weichert resources.

1 Listing or Sale Per Associate, Per Month

Ready to reach your goals?



Agent Commitment Agreement

First 90 Days

I understand that following the Weichert Realtors – Cornerstone introductory plan will assist me in having a successful future in real estate. I intend and agree to do the following:

1. Register and attend all Fast Track Sessions, beginning on: _____.
2. Meet with my mentor weekly, to receive guidance, training, assignments, and observation opportunities. First meeting scheduled for: _____.
3. Attend: Sales Meetings
 - In-House Training
 - MTS Training – <https://calendly.com/kdakanay-weichertcr>
 - Wednesday Webinars – Wednesdays 1 PM EST
 - One on ones with Coach
4. Use the 2-step DOORS listing presentation system to include “Getting to Know You” brochure on the first step and the Doors presentation, Leave Behind, Property Business Cards and the Price Trend Analysis on the second visit.
5. Use the Buyer Consultation System when working with buyers, including “Getting to Know You and Your Next Home” brochure, Pledge of Service, and the Guide to the Process brochures.
6. Hold a minimum of 3 Open Houses per month, using a minimum of 8 directional signs and 2 balloons on each sign. Follow the Weichert Open House system, using the Open House Timeline and Open House Checklist.
7. Call a minimum of 200 contacts weekly. Use the Weichert Calling Dialogue and Follow Up Guide.
8. Complete the myWeichert Quick Start Classes. Enter a minimum of 4 new contacts into your data base weekly. Target 40 touches annually to each through calls, social media, emails, drip campaigns, direct mail, and drop-in visits.
9. Send out at least 250 direct mail pieces every month.
10. Get familiar with all the Weichert tools and resources on Weichert University.
11. Review Weichert Tools Section on myWeichert.
12. Select a geographic farm area. Develop a calendar and schedule of touches, (calls, emails, texts, visits)
13. Complete your annual business plan, using the Business Planning Tool Kit found on Weichert University.
14. Present a professional image in the marketplace. (Include Dress Code if applicable.)

Date: _____ Sales Associate Signature: _____

Date: _____ Broker/Manager Signature: _____

Office Policies & Procedures

✓	Policy	Rules
	Fast Track	Fast Track is mandatory for new associates. The program consists of 9 sessions of comprehensive sales training. Cost is \$169.00. Register by visiting Weichert Events on the home page of Weichert University.
	Dress Code	Business Casual. Please, dress as if you are interviewing for a job with your clients...because you are!
	Wednesday Webinars	1-hour online training session, once per week. Every Wednesday at 1 PM EST. We will email you the schedule to these each month. When we do, register for each class at weichertevents.com and add to your Calendar.
	Sales Meetings	Sales Meetings are mandatory. Occurs every other week – unless announced. Add to your Calendar.
	In Office Trainings	WR-Cornerstone will schedule various trainings with management and guest speakers. These meetings are mandatory as trainee schedule permits. Times and dates will be communicated via email or text message.
	Weekly Mentor 1:1	Growing your business takes time and diligence. It can and will be frustrating at times, we. We don't want you to go at this alone. Schedule a 1:1 with your Mentor each week as your schedule permits. It will be worth it for your business.
	MTS Training	Kickstart your marketing: Meet with the MTS regularly.
	SUCCESS Card	The minimal monthly activities for associates are itemized on the SUCCESS card. The SUCCESS card is included in the Resources Section for Module 1. Sales Associates are required to complete the minimum monthly activities.
	Office Events	Sales associates are expected to attend office/community events.

Meet Your Coach

Mentor Name	Phone	Email	Date

NEW SALES ASSOCIATE AGREEMENT



1. The Experienced Sales Associate and New Sales Associate fill out Section 1, Experienced Sales Associate/New Sales Associate Agreement upon establishment of the relationship.
 2. All parties should sign and give the original to the Broker or Manager. Upon new Sales Associate's first and second transaction, the Experienced Sales Associate should:
 - Obtain a copy of this form from the Broker or Manager
 - Complete a "Transaction Worksheet" to indicate both Sales Associates are working together on the transaction
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SECTION 1: Experienced Sales Associate/New Sales Associate Agreement

(Experienced Sales Associate's name) agrees to partner with
(New Sales Associate's name) on the first two transaction sides of
real estate purchase or sale transactions the New Sales Associate is credited with closing. As part of the
partnership, the Experienced Sales Associates shall allow the New Sales Associate to shadow him/her to
accomplish the items identified in the PartnerUp Program Guidelines. In return,

(Experienced Sales Associate's name) shall be entitled to 25% of
the commissioned earned by _____ (New Sales Associate's name) on the
first two Weichert transaction sides closed.

New Sales Associate's Signature: _____ Date: _____

Experienced Sales Associate's Signature: _____ Date: _____

Broker/Manager Signature: _____ Date: _____

SECTION 2: Transaction Information

Transaction 1 MLS #: _____ (Attach copy of MLS Sheet)

Type (Check One): Listing Sale Both % to Exp SA _____ % to New SA _____

Property Address:

Broker/Manager Signature: _____

Transaction 2 MLS #: _____ (Attach copy of MLS Sheet)

Type (Check One): Listing Sale Both % to Exp SA _____ % to New SA _____

Property Address:

Broker/Manager Signature: _____



PartnerUp Program Guidelines

The PartnerUp program is designed to help a new Sales Associate get started in the business by having them partner with a competent, experienced Sales Associate who embraces Weichert's tools and systems.

The recommendations below are provided to help make the partnership as successful as possible, however, it is up to the two Sales Associates who are partnering to determine the best way to work together to close two transactions. In return for partnering, the New Sales Associate will share his/her commission with the experienced Sales Associate (recommendation is 25% of the new Sales Associate's commission on each of the first two transactions).

In addition to partnering together on the first two transactions, the experienced Sales Associate agrees to allow the new Sales Associate to **shadow** him/her on the following key sales activities.

- Open Houses (preparing for, conducting, and following up from Open Houses)
- Buyer Consultation
- Completing contracts and necessary paperwork as part of the transaction
- Step 1 Listing Appointment and prep for that appointment (using "Getting to Know You")
- Preparing a Price Trend Analysis
- Step 2 Listing Appointment and prep for that appointment (using the customized DOORS Portfolio)
- Completing a listing agreement and necessary paperwork as part of taking a listing

Target Audience: New to Real Estate.

Duration: Until new Sales Associate completes first two transactions.

Eligibility: Any licensed Weichert Sales Associate proficient in the Weichert tools and systems.

Anyone interested in working with a new Sales Associate as a partner should speak with their Broker or Manager.



PartnerUp Program Checklist

Bring this coaching guide with you to each PartnerUp meeting to check your progress and review next steps. Possible observation opportunities with your PartnerUp partner include:

Shadowing Appointments to Observe your Partner in the following:

- Open House (Minimum of 2)
- Listing Step One
- Listing Step Two
- Buyer Consultation
- Buyer appointment to view homes
- Home Inspection
- Settlement/Closing

Prospecting Activities:

- Practice dialogue
- Attend company/office call sessions together
- Neighborhood door knocking

Open Houses:

- Observe how to maximize traffic to an Open House – Calls, email blasts, social media, neighborhood invites, etc.
- Prepare for and conduct an Open House
- Build Your Open House Kit: Create marketing and neighborhood materials to display at Open Houses
- Observe and practice dialogue to engage and close with each of your guests
- Use the myWeichert Open House App to register attendees
- Observe tools and dialogue to follow up with each guest

Opportunity Time:

- Learn Opportunity Time Policy
- Handle phones at Opportunity Time
- Review and practice Point of Sale dialogue

Working with Buyer Activities:

- Customize and conduct a Buyer Consultation
- Review Exclusive Buyer Agency and disclosure forms
- Review procedures, paperwork, and checklist
- Prepare a sales contact
- Present and negotiate an offer (Present “in person”, when possible)
- Prepare for and attend a closing/settlement
- Attend appraisal appointment
- Attend property inspection
- Attend final walk-through

Working with Seller Activities:

- Customize and present DOORS Listing Presentation
- Complete and review a listing packet
- Prepare a Price Trend Analysis
- Conduct a Two-Step DOORS Listing Presentation
- Prepare/conduct a Price Improvement meeting using the Market Update Tool
- Negotiate an offer
- Prepare and go to a closing



Module 2

Integration

Module 2 – Integration

There are many things to do when you are a new associate or new to our company. Please complete these tasks as possible. As soon as you are finished with this Module 1 - Integration, you'll be prepared to continue with Module 2. Please place a checkmark in the box when you have completed each item.

The list is broken in categories. Review your progress with your mentor/coach at your weekly one-on-one.

Administrative:

✓	Admin Item	Notes
	Tour the Office	Schedule a more detailed tour of the building. Learn where all tools, resources, training materials, your mailbox, documents, signage area, lock boxes, marketing materials, open house boards, etc., are located.
	Conference Room and Scheduling	You may use them as needed. To schedule, talk to the front desk at (610-624-1818) to reserve your time. These are for client meetings only. Cancel reservation if you no longer need it.
	Set Up Voicemail	Access your voicemail, and change your greeting, letting callers know you are an agent with Weichert, Realtors - Cornerstone
	Create Email Signature	Include your name, title, phone number, email, and company logo
	Learn How to Use Office Equipment	Scanner, fax, copier, computers, postage machine, helium tank, etc.
	Review Live Well	Enroll by calling 1-888-610-1031. For more information, visit promo.getmerido.com/programs/weichert-affiliates . Enrollment is on a rolling basis by the 18 th of the month. Live well flyer located in the resource section of Module 2 - Integration

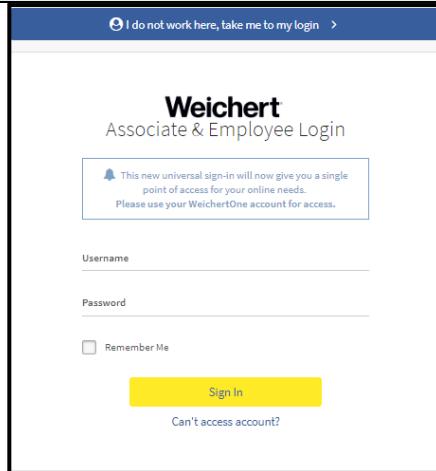
Realtor Associations and MLS

✓	Realtor Assoc/MLS	Action Item
	Become member of your board or Realtors. Board Name _____	Fill out the Membership Form and send to (insert local MLS information.) Pay all the necessary dues for NAR, State and local association, MLS and Electronic key.
	New Member Orientation and Ethics Class	Schedule a Time to take the New Member Orientation. We strongly recommend you take this class ASAP. You can schedule here: (include website) _____ Orientation Class Date: _____
	MLS Training Class	Schedule a Time to take the MLS Training Class. You schedule this at the same time as your Orientation. MLS Training Date: _____
	MLS Account	Once you have MLS access, you can access _____, our MLS system. We suggest you set this up at their office, in case you have any issues logging in or have questions. The MLS access website is here: (include website) MLS Login: _____ MLS Password: _____
	ShowingTime	ShowingTime (or insert what your company uses) This is a convenient application to schedule appointments. It allows brokers to schedule showings online and eliminates a lot of scheduling logistical load. You can access ShowingTime via (your local MLS) but you will also have a separate login. See the Help Page in ShowingTime for information on how it works. Login: _____ Password: _____
	RPR	RPR is a quick useful app for pulling both public records on properties, as well as providing rough ideas of property value. RPR is accessed via the local MLS, and also has its own separate login. Login: _____ Password: _____

Weichert Systems

Getting Started

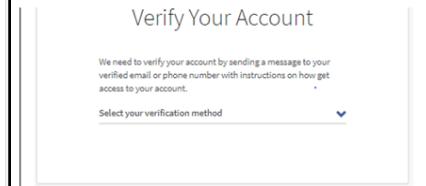
All our Weichert systems can be accessed through my.weichert.com with Single Sign on credentials
Go to www.my.weichert.com
Enter log in credentials you received in an email.
If you can't find the message, contact the service desk, and request your log in credentials 973-290-5722



The screenshot shows the Weichert Associate & Employee Login page. It features a blue header bar with a link to 'I do not work here, take me to my login'. Below the header is the 'Weichert' logo and the text 'Associate & Employee Login'. A message box states: 'This new universal sign-in will now give you a single point of access for your online needs. Please use your WeichertOne account for access.' There are fields for 'Username' and 'Password', a 'Remember Me' checkbox, and a yellow 'Sign In' button. At the bottom is a link 'Can't access account?'

To set up your verification method
Click on "Can't Access Account?"
Choose from the Drop-Down Box

Best Practice: Send your Verification code to your cell number

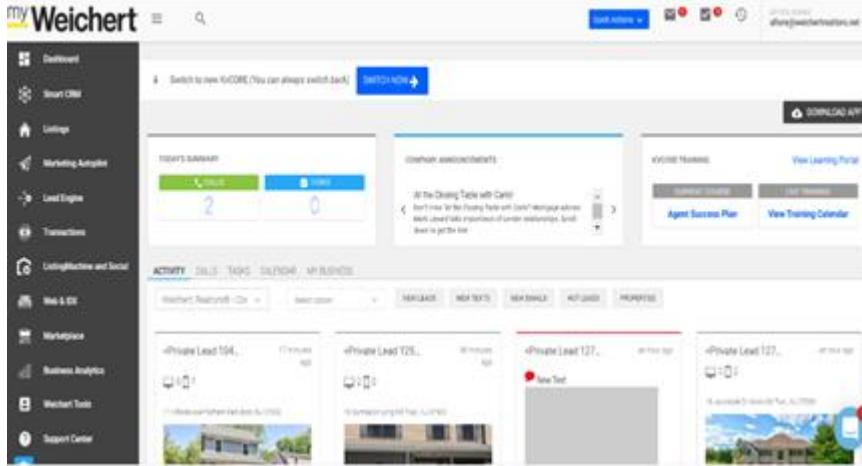


The screenshot shows the 'Verify Your Account' section. It includes a message: 'We need to verify your account by sending a message to your verified email or phone number with instructions on how get access to your account.' Below this is a dropdown menu labeled 'Select your verification method'.

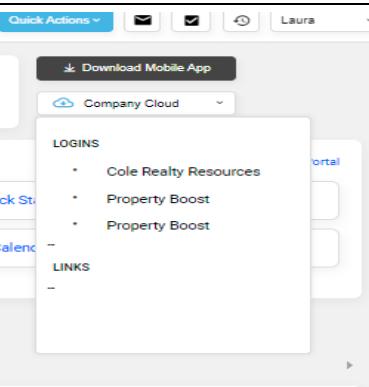
myWeichert

[\(www.my.Weichert.com\)](http://www.my.Weichert.com)

myWeichert is your full **Contact Relationship Management** system. This system will efficiently and effectively run your business. You need to build and manage a database of your prospects, leads and clients. myWeichert also provides you the tools to generate more leads, organize your prospecting activities, customize automated campaigns and promote your personal website



Cole Realty Resource and Weichert have partnered to provide a database of neighborhoods with home &  address and phone numbers scrubbed against the DNC list. You can access Cole Realty Resource from your myWeichert homepage – under the Company Cloud dropdown.



Work with your Manager to identify a farm area, then pull the list of contacts available in your farm to import to myWeichert CRM and prospect by mail/call/email

Weichert Tools

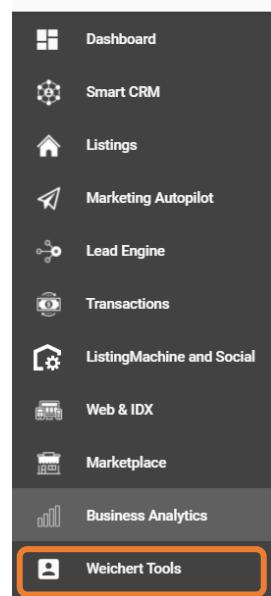
(www.weicherttools.com)

Weichert Tools can be accessed from the left toolbar on your myWeichert dashboard or by entering the above address into your browser.

This page provides access to all Weichert Systems – University, WeichertOne and Weichert Design Center Resources and Tools to support you in your sales activities and lead generation are located in the *Marketing Resources* tile and *Tools & Resources* tile and *Personal Marketing Materials* tile.

Take time to open each tile and review the materials available.

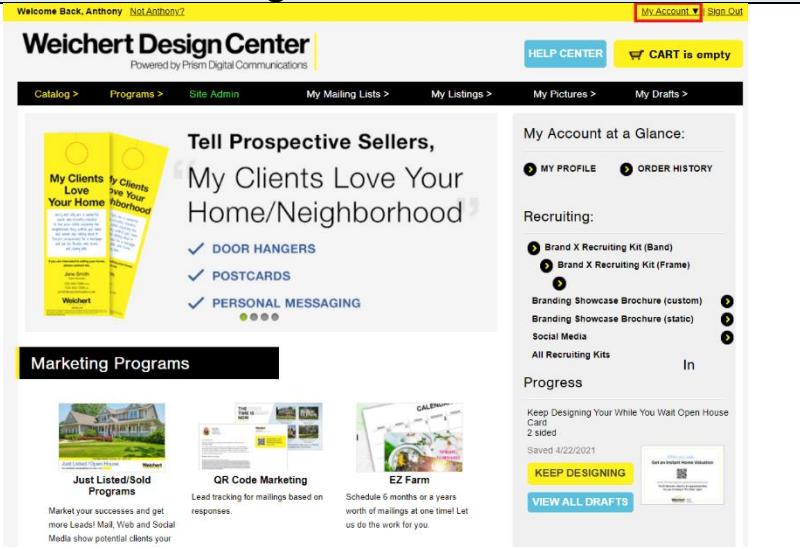
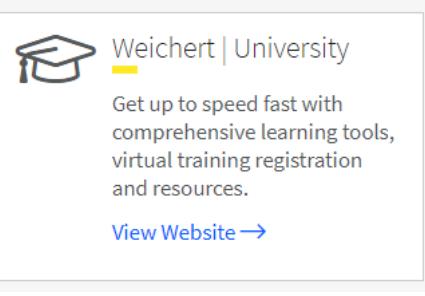
my Weichert



Weichert Tools

You have 0 alerts waiting to be viewed.

Projects Create Listing Presentations, Leave Behinds and more. Select Customer →	My Profile View and update your contact information and other personal data. Edit Profile →	My Bio Fill in the sections to create a custom biography. Edit My Bio →	My Photos Add photos of yourself for your personal branding library. Edit Photos →
Personal Marketing Materials Order signs, create brochures and more. Get Started →	Pure Gold Follow up with past customers and build relationships. Manage Customers →	Marketing Resources Download reference sheets, branding assets and more. View Resources →	Tools & Resources Build your business with these informative guides. View Resources →
Weichert University Get up to speed fast with comprehensive learning tools, virtual training registration and resources. View Website →	Open Houses Download registry and create affordability flyer. View Open Houses →	Weichert Exclusives Exclusive offers, news and more. View Exclusives →	WeichertOne Access employee resources and other vital links. View Website →
Weichert Tools Tickets Manage your Service Desk tickets. Go to my tickets →	myWeichert Apps Power your mobile device with the myWeichert platform View Apps →	Virtual Open House Manage virtual open house details Manage VOH →	Forms Online Efficiently create and manage your listing agreements, contracts and leases. View Resources →

WeichertTools	Personal Marketing tile
<p>Weichert Design Center is our partner, providing professional personal and property marketing pieces as well as effective direct mail campaigns.</p> <p>Go to "My Account" Check your account settings and verify your email address</p> <p>Set up your Profile</p> <p>Upload professional photo</p> <p>Add your Website</p> <p>Add a payment method</p>	
Weichert Tools	Weichert University tile
<p>Weichert University is your resource for a variety of training resources – both LIVE web-based and self-paced, to support you in your business. Check back often for new programs and workshops designed for Sales Associates at all levels of experience.</p>	
Weichert Tools	Weichertone
iMail (Quantum Digital)	<p>This is your one stop marketing platform. Go to www.wreaimail.com in the upper right corner click on the "Login" button. Your username should be your email and your password should be your last name in all lowercase letters. It takes about two days for this program to activate. Once activated, go to the grey person icon in the upper right-hand corner and click the black down arrow. Select the "My Profile" tab and fill in the needed information. Do not forget to save these changes!</p> <p>Username: _____</p> <p>Password: _____</p>
Google Accounts	If you do not have a gmail account, please create one. You don't have to use it as your main account, but you will need it.
Facebook Private Group	We have a private Facebook group, just for us brokers! Make sure that you have received an invite from us for access to this group, ask us if you have not received it. The group name is: _____

Personal Tools for Business

	Item	Description
	Bio	Write your Bio and upload it to myWeichert and Weichert Tools. Use the instructions sheet, on how to write the Perfect Bio.
	Picture	Take your headshot, and upload it to myWeichert and Weichert Tools Get recommendation from Manager/Mentor for photographer.
	SOI Contacts	Compile a list of your initial client list in an excel file (everyone you know). Reference the attached “Sphere of Influence” sheet.
	Name Badge	Office will order and will notify you when they arrive.
	Business Cards	Office will order and will notify you when they arrive.
	Sales Associate Resource Summary	This is an overview of Weichert’s tools and services. Located on Weichert University – Business planning section.
	Business Planning Tool	Automated tool located on Weichert University under the Business Planning Section. A Video, a Sources of Income document, the Sales Associate Resource Summary, a Self-Assessment Tool, and a Detailed Success plan are included for helping you establish a budget and action plan for your business. When finished click “Submit” and your manager will receive a copy.

Phone Applications: Download and install all of these.

✓	App	What it Does
	RPR	Mobile Access to RPR property info and values
	Facebook	Social Media
	Facebook Pages	For posting to your business page
	GoToWebinar	Allows you to view Weichert Webinars on mobile
	Google Drive	Access training and other documents on mobile
	Mile IQ	Automatically records your mileage for expense tracking
	ShowingTime	Mobile Access to schedule showings while on the road
	Homesnap	Real estate search engine
	MyWeichert	Mobile Access to MyWeichert App (do NOT use kvCore app)
	MyWeichert Open House	Stand-alone app for use at open houses, synchronizes with MyWeichert
	Canva	Give you access to stock photos and fonts to create social media templates and posts

Weichert's Automated Business Plan

The business planning tool is instrumental in developing your annual goals. You will also receive help from your manager/mentor during the process. The business planning tool tracks your efforts in reaching your goals.

Weichert's Automated Business Plan

✓	Action Item	Notes
	Automated Business Planning Tool	Located on Weichert University under the Business Planning tile. The plan consists of a series of questions to ascertain what activities you

		plan to do and projects your financial earnings, based on these activities.
	Sources of Income Document	This document will assist you in your development of the business plan. Located on Weichert University under the Business Planning tile.
	Associate Self-Assessment Tool	Located on Weichert University under the Business Planning tile. This tool will assist you in choosing the sales activities necessary to generate your desired income.
	2025 Weichert Success Plan	Located on Weichert University under the Business Planning tile.
	2025 Business Plan Video	Watch this video, located on Weichert University under the Business Planning tile. This video will demonstrate how to complete the steps of the business planning process

Errors and Omissions Insurance

Most state real estate commissions require Error and Omissions Insurance (E & O). The information for obtaining this for our state is listed below.

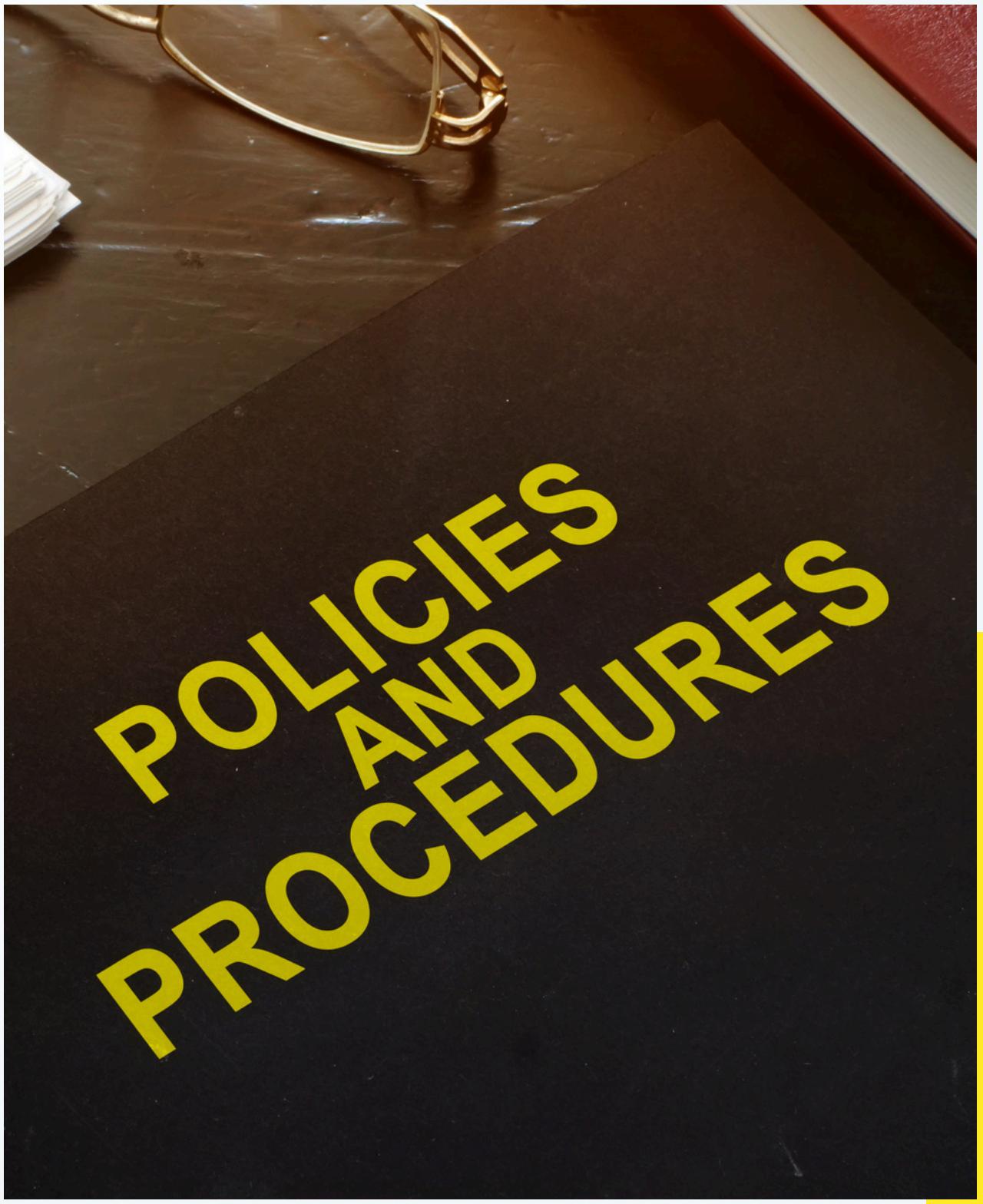
Errors & Omissions Insurance

✓	Admin Item	Notes
	Obtain an Errors & Omissions Policy	

Weichert

REALTORS®

Cornerstone



AGENT HANDBOOK

A Guideline to Working at Weichert Realtors, Cornerstone
©2025



Weichert Realtors | Cornerstone – Dress Code Policy

At Weichert Realtors | Cornerstone, we value professionalism in all aspects of our work, including how we present ourselves to clients, colleagues, and the public. To maintain a professional and welcoming environment, the following dress code policy applies to all agents and staff.

Dress Code: Business Casual

When in the office, attending meetings, or meeting with clients, all agents are expected to dress in **business casual attire**. As representatives of Weichert Realtors | Cornerstone, it is important to maintain a polished and professional appearance at all times.

Business Casual Attire Guidelines:

1. Men's Business Casual:

- Collared shirts (e.g., polo shirts, button-downs)
- Slacks or khakis
- Dress shoes or professional loafers
- Blazers or sweaters (optional)

2. Women's Business Casual:

- Blouses, sweaters, or professional tops
- Pants, skirts, denim trousers, or dresses (appropriate length and fit)
- Dress shoes, loafers, dress sandals, or professional flats
- Blazers, cardigans, or professional jackets (optional)

Unacceptable Attire:

- T-shirts, tank tops, or graphic shirts
- Tight jeans, shorts, or athletic wear
- Flip-flops, sneakers, or casual sandals
- Any clothing that is ripped, torn, overly casual, or revealing

Professional Representation:

Agents and staff at Weichert Realtors | Cornerstone are professionals always in the public eye. The way you present yourself reflects not only on you as an individual but also on the company. Dressing appropriately shows respect for your profession, your clients, and the company.

Exceptions:

- Casual attire may be worn during after-hours events or office-only days with prior approval from management. However, if client interaction is expected, business casual attire is still required.

We trust all agents and staff to use their best judgment in selecting attire that is both comfortable and professional. Failure to adhere to this dress code may result in a discussion with management.

Thank you for your cooperation in maintaining a professional environment at Weichert Realtors | Cornerstone.

Weichert Realtors | Cornerstone: Office Social Media Policy

Policy Overview: At Weichert Realtors | Cornerstone, we prioritize a unified and professional presence across all social media platforms. Therefore, we maintain **one official business page** to represent the company. This policy outlines the guidelines for office-specific social media use, including the management of Facebook pages and groups. **Policy Guidelines:**

1. Single Company Page:

- Weichert Realtors | Cornerstone operates **one business page** on Facebook and other major social media platforms. This page represents the entire company, including all offices, to ensure consistent branding, messaging, and management.

2. Office Social Media Use:

- **Private Groups for Teams:** Individual offices are permitted to create **private groups** on Facebook for internal team communication and collaboration. These groups are intended to support team discussions and are not to be used for public-facing posts or marketing purposes.
 - **Administrative Oversight:** For any private groups created, at least one member of the Weichert Cornerstone executive team must be made an **admin** of the group. This ensures oversight and continuity if changes in group membership occur.
- **No Individual Office Facebook Pages:** Individual offices are **not permitted** to create their own public Facebook pages. This ensures that the company maintains control over all branded content and social media accounts.

Reasons for the Policy:

- **Staffing Limitations:** Offices typically do not have dedicated staff to manage social media pages. Maintaining a business page requires consistent posting, monitoring, and engagement. Without the proper resources, pages may become inactive, reflecting poorly on the company's reputation.
- **Perception of Inactivity:** An inactive or sparsely populated Facebook page gives the impression that the office is not engaged in business activities. This could negatively impact the overall brand and client perceptions.

- **Account Ownership Risks:** If individual offices create Facebook pages and the account administrator (e.g., office manager or agent) leaves the company, Weichert Realtors | Cornerstone risks losing control over the page. Without access, we cannot properly manage or deactivate the page, leading to potential misuse or brand misrepresentation.

Conclusion: For consistency, brand integrity, and operational efficiency, Weichert Realtors | Cornerstone maintains one official social media presence for public-facing communications. Offices are encouraged to collaborate with the main company page for content sharing and marketing efforts. Private groups may be used for internal team collaboration, but no additional public Facebook pages are allowed.

Commission and Photography Reimbursement Policies

Effective immediately, all agents at Weichert Realtors, Cornerstone are expected to adhere to the following company policy regarding listing commissions and photography reimbursement.

Commission Policy:

1. Standard Listing Commission:

- The minimum commission for any listing must be **2.5% or more**, plus the following fees:
 - \$399.00 (administrative fee)
 - \$325.00 (conveyancing fee)

2. Cooperating Compensation:

- For transactions involving cooperating compensation, the total commission must be **5% or more** plus the following fees:
 - \$399.00 (administrative fee)
 - \$295.00 (conveyancing fee)

3. Minimum Commission for Listings Below \$100,000:

- For properties listed below \$100,000, the minimum total commission is set at **\$5,000**:
 - \$2,500 per side of the transaction.

4. Commission Approval:

- Any commission rate lower than **2.5%** must receive prior approval from a manager. Failure to do so will result in the agent owing company dollar on the transaction unless otherwise approved by the manager.



5. Personal Transactions:

- When selling your **primary residence**, you are permitted to waive the commission and earn zero commission on the sale.
- For all other personal real estate transactions, including investment properties or flipped homes, the standard commission structure outlined above applies.
- Any commission less than **2.5%** on these transactions will be subject to company dollar unless explicitly approved by a manager.

6. Friends and Family:

- There are no friends and family discounts within our commission schedules.
- Agents may waive part or all of their own commission after the company dollar portion has been paid.
- Management approval is required for any commission waivers.

Photography Reimbursement Policy:

- **Photography reimbursement requests** must be submitted with the transaction file at the time of closing.
 - **Reimbursement requests submitted after the commission has been paid will not be honored.**
 -

Please ensure that all commissions and reimbursement requests follow these guidelines. If you have any questions or require clarification, feel free to reach out to your manager for further assistance.



Policy for Agents Selling or Purchasing Their Personal Residence

Weichert Realtors | Cornerstone understands that agents may occasionally sell or purchase their personal residence. To support agents while maintaining consistency in commission structures, the following policy applies:

1. Eligibility

- This policy applies only to transactions involving the agent's **personal primary residence**.
- Transactions involving **investment properties, flips, or secondary residences** are excluded and will be subject to the agent's standard commission split level.

2. Commission Structure

- Agents will be eligible to receive **90% of a 2.5% listing or selling commission** on their personal residence.
- This benefit is available **twice per calendar year**, defined as:
 - **One transaction** where the agent sells their personal residence.
 - **One transaction** where the agent purchases a personal residence.

3. Conditions and Limitations

- Transactions exceeding the two-per-year limit will be paid at the agent's standard commission split level.
- The property must be clearly identified in the transaction documentation as the agent's **primary residence** to qualify.
This policy does not apply to dual agency transactions where the agent represents both the buyer and the seller.

4. Approval Process

- Agents must notify the **office manager** and provide documentation confirming that the property is their primary residence before listing or purchasing.
- The transaction will be reviewed and approved by **Nick (Broker/Owner)** to ensure compliance with the policy.

5. Compliance

Failure to comply with the terms of this policy may result in commission adjustments or other corrective action as deemed appropriate by management.

Weichert Fast Track!

Congratulations on joining **Weichert Realtors® | Cornerstone**! We're excited to help you hit the ground running and set yourself up for long-term success.

To give you the tools, systems, and training you need, **Weichert Fast Track Training** through Weichert University is **mandatory for all new agents**.

Here's What You Need to Know:

Register Quickly

- You have **30 days from your start date** to register for Fast Track. This ensures you're ready to dive in and start building your business.

Cost & Reimbursement

- The Fast Track course costs **\$169** — that's less than \$19 per session!
- Once you close **three real estate transactions** (buying or listing), we'll **reimburse your registration fee**.
- *Note: Rental transactions are excluded, and your license must remain active with Weichert Realtors® | Cornerstone to qualify.*

Sessions

- Fast Track includes **9 total sessions** covering everything you need to know to succeed in real estate.

Why Fast Track Matters

- Learn how to **leverage Weichert systems and tools**.
- Build confidence with buyers and sellers.
- Set a strong foundation for a **successful 2026**.

Mindset = Success

Your success starts with the effort you put in today. NOW is the time to invest in your growth!

Education and Professional Development Policy

At Weichert Realtors | Cornerstone, we encourage our agents to continually invest in their professional growth and development. As independent contractors, it is your responsibility to advance your career through education and training, which ultimately benefits your business and enhances your expertise in the real estate industry.

Education Fees Policy:

- **Responsibility for Fees:**

Agents are fully responsible for the costs associated with any education or training they pursue to advance their career. This includes, but is not limited to:

- Continuing Education (CE) courses
- Broker education
- Real estate designations or certifications (e.g., GRI, CRS, ABR, etc.)

- **Non-Reimbursement by Company:**

Weichert Realtors | Cornerstone will **not reimburse agents** for any fees related to the above educational courses, certifications, or programs.

Independent Contractor Responsibility:

As independent contractors, it is your responsibility to maintain and enhance your professional knowledge. Investing in education and training is a valuable asset to your career and business. Whether it's fulfilling state-mandated Continuing Education requirements or pursuing designations to expand your skill set, these efforts contribute to your long-term success in real estate.

Weichert Realtors | Cornerstone supports your commitment to learning and growing as a professional, but all costs associated with such education are the sole responsibility of the agent.

Thank you for your understanding and continued dedication to excellence.



Cornerstone

**** Continuing Education (CE) – Stay Compliant, Stay Confident****

At Weichert Realtors® | Cornerstone, we're dedicated to helping you stay on top of licensing requirements—so you can focus on building your business. Here's the low-down on CE:

- Submit Your CE Certificates Right Away**

Once you complete your CE coursework, just email your certificates to Support@weichertcr.com—easy, right?

- Know Your Deadline:**

- **PA agents:** Due **every even year** by **May 31**
- **NJ agents:** Due **every odd year** by **April 30**
- **DE agents:** Due **April 30 each year**
- **MD agents:** Due **30 days before their specific license renewal date.**

- Why It Matters**

Submitting CE on time not only keeps your license valid—it keeps your leads flowing and your support ongoing! Missed deadline? Lead distribution and company support will be paused until you're back in compliance.

- Friendly Reminders Ahead**

We'll nudge you **60 days** and **30 days** before your deadline to keep things on track.

- Questions? We've Got You Covered**

Just reach out to Support@weichertcr.com if you want insider tips on courses, formats, or submission.



Quick CE Reminder

State	Deadline Pattern	Due Date
--------------	-------------------------	-----------------

PA	Even-year Deadline	May 31
NJ	Odd-year Deadline	April 30
DE	Annual Deadline	April 30
MD	Annual Deadline	See above

Remember—submit promptly, and you're always in the clear. Let's keep things moving smoothly. Thanks for doing your part to keep us compliant!



Policy Update: Home Warranty Requirement for All Transactions (2025)

Effective Date: January 10, 2025

Issued By: Weichert Realtors | Cornerstone

Required By: Pearl Insurance (Insurance Broker) and Weichert Realtors | Cornerstone

Overview

In compliance with the requirements set forth by our insurance broker, Pearl Insurance, all real estate transactions managed by Weichert Realtors | Cornerstone must include a signed Home Warranty form. This applies to both buyers and sellers. The Home Warranty form must explicitly indicate whether the client is **accepting** or **denying** coverage.

Agent Responsibilities

1. Mandatory Documentation:

- a. Ensure that the Home Warranty form is completed and signed by all parties involved in the transaction.
- b. Upload the signed Home Warranty form to SkySlope as part of the required transaction documents.

2. Compliance Check:

- a. Review the transaction packet to confirm that the Home Warranty form is included and properly signed before submitting the file for approval.

Penalties for Non-Compliance

Failure to obtain a signed Home Warranty form will result in the following consequences:

- \$5,000 Deductible Responsibility:**

- If a claim arises from a transaction without a completed Home Warranty form, the responsible agent will be personally liable for the \$5,000 insurance deductible.

GUIDELINES FOR REFERRAL ASSOCIATES

CAN:

- Call your sphere of influence regularly and ask for business.
- Act as the link between the prospect and the real estate professional.
- Send iMail cards and/or approved flyers.
- Have your spouse mention real estate at their place of business and distribute your business card.
- Stay in contact with local offices.

CANNOT:

- List or show homes.
- Belong to any Board of Realtors or use the MLS, lockboxes, listings, etc.
- Prepare a contract of sale unless you pay for Error & Omissions (E&O) insurance annually.
- Expect a commission “after the fact” if the Sales Associate has already been working with the client before the referral lead was placed. If in doubt, contact our office.

DO:

- Refer yourself.
- Refer prospects to WRC broker/Manager,
- Distribute business cards representing WRC and your referral status.
- Gather the five basic pieces of information needed for placing the referral.
- Inform us immediately of any address, phone, or email address changes.
- Send us Referral Forms on all referrals placed directly (not required if you call us first).
- Use your licensed name when placing referrals.
- Promote your company and your Sales Associate contact.
- Elicit a commitment from the prospect to work with our professional, full-time Sales Associate.
- Keep in touch with the prospect when they want to sell what they’ve just purchased.
- Keep WRC admin informed about your referral progress.
- Re-refer the prospect when they want to sell what they’ve just purchased.



- Attend WRC referral seminars.
- Expect to receive a 25% referral fee (usually within 20 days of closing). The agent will be paid 25% of the referral side at a 50/50 split.

DO NOT:

- Discuss listing commission percentages — this is between the prospect and the sales professional.
- Qualify the lead; only gather general information.
- Allow the prospect to believe they should call you for every question — they need to trust the Sales Associate.
- Use your married name when calling in referrals if you are licensed under your maiden name.
- Forget to refer yourself when you have a real estate need — we can refer you around the world.

Referral Agent Signature

Date

Manager/Broker/Owner Signature

Date

REFERRAL ASSOCIATES AGREEMENT

All sections must be completed during orientation.

Contact Support@weichertcr.com with any questions on your status.

Personal Information:

- Full Name: _____
- Address: _____
- DOB (dd/mm/yyyy): _____ EIN# or SS#: _____
- Cell Phone: _____ Email: _____
- License #: _____ License Exp. Date: _____

Preferred Referring Agent:

- Name of Preferred Referring Agent: _____

This agreement is formed between **Weichert, Realtors® - Cornerstone**, hereinafter referred to as "Broker," located at **136 2nd Ave Collegeville, PA 19426**, and the licensee whose name appears below as Referral Agent.

1) WRC Referral Associates agree to forward to BROKER any leads they may acquire for the purpose of listing properties and/or buyer leads.

2) Referral Agent will be paid 25% of the referred side at the 50/50 split.

Example: A \$300,000 sale with a 3% commission = \$9,000. Subtract the Weichert Franchise/Marketing Fee of 8% (\$720), leaving \$8,280. Then, implement the 50/50 split = \$4,140. You will get 25% of that = a commission check to you in the amount of \$1,035.00.

Manager/Broker/Owner Name: _____ Date: _____

Manager/Broker/Owner Signature: _____ Date: _____

Referral Agent Signature: _____ Date: _____



AGENT ACKNOWLEDGEMENT

I acknowledge that I have received and reviewed the Weichert Realtors® | Cornerstone Agent Handbook, which outlines the company's policies, procedures, and expectations. I understand it is my responsibility to read, understand, and comply with the information provided in the handbook.

By signing this acknowledgment, I agree to adhere to all policies and procedures outlined in the handbook, including but not limited to lead management, communication protocols, and ethical standards. I understand that failure to comply with these policies may result in corrective action, up to and including termination of my association with Weichert Realtors® | Cornerstone.

I also understand that the information in this handbook is subject to change, and it is my responsibility to stay informed about updates communicated by the company.

Please sign below,

Signature of Employee

Date



Policy on Real Estate Commission Advances

Effective Date: January 15, 2025

Purpose This policy establishes the guidelines for managing real estate commission advances for agents at Weichert Realtors | Cornerstone. The company is committed to maintaining a clear understanding of the responsibilities concerning financial management for its agents.

Policy Statement Weichert Realtors | Cornerstone will not provide floating or upfront advancement of real estate commissions to agents. Agents are responsible for their personal finances, and it is not the company's responsibility to cover an agent's bills until their commission check clears. Agents are expected to manage their financial obligations independently and plan accordingly.

Commission Advances Agents have the option to receive a commission advancement under the following conditions:

- 1. Advance Request Fee:** Agents may request a commission advance by paying a fee of \$25.
- 2. Advance Period:** Upon paying the fee, agents are eligible for a commission check advancement of up to [Insert Number] days from the standard payment date.
- 3. Request Procedure:** To request a commission advancement, agents must complete the Commission Advance Request Form and submit it to the designated finance personnel or department for processing.

4. **Approval Process:** All requests for commission advances are subject to approval by Weichert Realtors | Cornerstone. The company reserves the right to approve or deny any advance requests at its discretion.
5. **Limitations:** Commission advancements are only available for transactions that have closed and have all necessary documentation completed and approved. No advances will be made for pending or incomplete transactions.

Agent Responsibilities

Agents are responsible for understanding and complying with this policy. Any questions or concerns regarding commission advances should be directed to the appropriate finance personnel or department for clarification.

Amendments

Weichert Realtors | Cornerstone reserves the right to amend this policy at any time. Agents will be notified of any changes to this policy.

Acknowledgment

I, _____, have read and understand the Policy on Real Estate Commission Advances. I agree to adhere to the terms and conditions outlined in this policy.

Agent Signature: _____ **Date:** _____



Cornerstone

Broker Fee Waiver Request Form

Date: _____

Agent Name: _____ **Agent License Number** _____

Office Location: _____

Client Name: _____ **Property Address:** _____

Transaction Type:

- Buyer
- Seller
- Other: _____

Reason for Waiver Request:

Please provide a detailed explanation of why you are requesting the waiver of the broker fee.

Waiver Amount: Original Broker Fee: \$_____

Requested Waived Amount: \$_____ New Broker Fee:\$_____

Supporting Documents:

Please attach any relevant documentation to support your waiver request.

Agent's Signature: _____ **Date:** _____

Office Manager's Approval:

- Approved
- Denied

Office Manager's Comments:

Office Manager's Signature: _____ **Date:** _____