Policies & Procedures Manual

RE/MAX One Realty
August 2024

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“Welcome to RE/MAX ONE Realty”

Dear Agent or Staff Member:

On behalf of the owners and management of RE/MAX ONE Realty, we would like to welcome you aboard! It is with great pleasure to have a professional of your caliber among our team.

We anticipate a long and successful relationship together as we grow both in prosperity, professionalism, and a service to our communities.

If there is anything we can do to assist you, or if you have any questions, please do not hesitate to ask us, as we are here to assist you.

Sincerely,

John Benson
Broker of Record/CEO
RE/MAX ONE Realty

This manual is meant to be all encompassing for the company. Parts of this manual only apply to staff members of RE/MAX One Realty. Nonetheless, this info is shared so that all are aware of the policies and guidelines RE/MAX One Realty's staff are expected to follow. There are different acknowledgements of this manual that will be distributed based on whether you are an agent (Independent Contractor) or a staff member (employed as a W2 employee by RE/MAX One Realty.)

RE/MAX ONE Realty VISION AND MISSION STATEMENT

Our Vision

To provide a platform for agents to build a successful business while delivering an incredible, concierge level experience.

Our Mission

At RE/MAX ONE Realty we fulfill our vision by:

- Truly understanding our customers' needs and requirements
- Understanding the needs of the modern agent to provide great services
- Being profitable and delivering sustainable, profitable growth: Everybody Wins!
- Managing costs to maintain a competitive advantage yet creating value
- Offering our agents personal growth and a motivating place to work
- Being innovative and providing modern facilities and systems to our agents
- Establishing efforts to maintain a positive and learning-based work environment

- Being good corporate citizens
- Providing an exceptional concierge level support staff
- Enabling a culture focusing on sharing, quality, and accountability

Our main mission is to establish an organization that provides agents with both the proper facilities and tools to become outstanding agents, and demonstrate an environment that is positive, professional, goal-oriented and energetic!

Our Purpose is to provide agents with resources, information, and guidance so they can better serve their clients.

The '4 keys' to RE/MAX One Realty are Courteousness, Communication, Resources, and Efficiency.

Our Values

INTEGRITY, HONESTY and ETHICS
PERFORMANCE and EFFICIENCY
SINCERITY
INNOVATION through CREATIVE SOLUTIONS and SERVICES
SOCIAL RESPONSIBILITY

Office Locations

RE/MAX One has 6 offices throughout PA and Southern New Jersey:

- Passyunk - 1842 E Passyunk Ave, Philadelphia PA 19148
- Haddonfield - 24 Tanner St, 1st Floor, Haddonfield NJ 08033
- Moorestown - 2 E Main Street, Moorestown NJ 08057
- Feasterville - 521 Bustleton Pike, Feasterville-Trevose PA 19053
- Fox Chase - 435 Rhawn Street, Philadelphia PA 19111
- Huntington Valley - 2600 Philmont Ave , Huntingdon Valley PA 19006

Office Hours

Office hours are as follows:

Moorestown

Monday thru Friday 9am* to 5 pm EST or by appointment

Haddonfield
by appointment

Passyunk Ave
Monday thru Thursday 9am* to 5 pm EST or by appointment
Friday by appointment

*(Staff note - These times are when the day starts, not when you should arrive.)

These are the times a staff member(s) can be expected to be on duty and doors are guaranteed to be open. We are closed on these eleven (12) recognized holidays: New Years Day, Presidents' Day, Easter Monday, Memorial Day, Juneteenth, Independence Day, Labor Day, Thanksgiving (and the Friday following), Christmas Eve, Christmas Day, and New Years Eve. When a recognized holiday falls on a Saturday, the office will be closed the previous Friday. When a recognized holiday falls on a Sunday, the office will be closed the following Monday. Every effort to accommodate cultural, sacred and/or religious customs will be met and may be announced by management. Recognition of those holidays must be granted by a Broker/Manger and/or Broker/Owner.

Keys & Access Codes

Each agent & staff member will be issued office keys/ access codes for the offices. If keys are lost, replacement of both keys and locks will be at that individual's expense. In the event an associate is no longer affiliated with our firm, any and all keys must promptly be returned to management. Keys and codes are non transferable and are only for the use of the person to which they have been assigned. No key copies should be made without the manager's previous authorization.

If an associate has terminated his/her affiliation (or has their affiliation terminated by a broker) w/ RE/MAX ONE Realty, all keys must immediately be returned to the office. That associate will not be permitted to access the office nor common areas of building after business hours. Any attempt to access the grounds will be considered breaking and entering, and will be prosecuted to the full extent of the law.

Office Access after Business Hours & on Weekends

Associates can (and are encouraged to) work in the office spaces at any time. Persons accessing any office after hours must keep the main door properly closed and locked when leaving and activate the security system (if applicable). In the same way, lights and electrical devices must be turned off before leaving. Agents are encouraged to utilize evenings and weekends to answer floor calls and service the public.

Employment Opportunity

It is the policy of this company to provide equal opportunity employment to all employees and applicants for employment. No person shall be discriminated against in employment because of race, age, religion, sex, national origin, marital or veteran status, or the presence of a non job-related medical condition or handicap. This policy includes but is not limited to help-wanted advertising, general recruiting, hiring, placement, upgrading, transfers, rate of pay and termination guidelines.

Ethics

The National Association of Realtors has adopted a code of Ethics as a standard for its members. In short, the members agree to abide by the "Golden Rule": "Do unto others as you would have them do unto you." Copies of the Realtor Code of Ethics are available from the National Association or your local Board of Realtors.

It is more desirable for a Sales Associate to lose a sale than misrepresent the facts and cause a negative reflection upon their honesty and integrity. We at RE/MAX ONE Realty abide by the code of ethics and expect every associate to follow this standard.

Broker/ Managers

Each office has a broker of record/manager to supervise and advise agents and their transactions. Should the office decide to staff a sales manager, the sales manager may have an associate broker's license and may be selected from within the firm or have experience from another firm. Qualifications are based on transaction production, integrity, values, professionalism, and technical experience.

Alcoholic Beverages and Drugs

Company Policy: no one is to drink any alcoholic beverage prior to transacting real estate business on that given day.

Prohibition against Drug Use: drug use of any kind, other than properly prescribed and used medicines, is strictly prohibited at all times.

Smoking Policy

The offices and buildings provide a smoke-free work environment for employees. Therefore, no smoking is allowed anywhere on the premises. This includes vaping and electronic cigarettes.

Sexual Harassment

This office will not tolerate verbal or physical conduct by any employee which harasses, disrupts, or interferes with another's work performance or which creates an intimidating, offensive, or hostile environment. While all forms of harassment are prohibited, our policy is that sexual harassment is specifically prohibited.

Any employee who believes a violation of our policy against sexual harassment has occurred should immediately report that information to a managing broker. Any employee, associate, or manager who is found after appropriate investigation to have engaged in harassment of another person will be subject to appropriate disciplinary action, depending on the circumstances, up to and including termination.

Dress Code

When working as staff at any RE/MAX One office, modern business casual attire is the minimum requirement. Since the office will continually have visitors (company representatives, clients, etc.), it is expected that everyone will dress in a professional manner. We request that when you are in the office, you dress in a manner conducive to meeting the public and presenting a professional image. Some examples of appropriate business attire include button-up dress shirts (with or without a tie), polo shirts, pressed khakis, chinos, or dress slacks, sweaters, blouses, sportcoats, jackets, skirts and dresses (of appropriate length).

Ripped or worn-out jeans and sneakers not appropriate for business casual attire.

Employees are expected to demonstrate good judgment and professional taste. Use courtesy towards coworkers and your professional image to customers as the factors you use to assess whether you are dressing in business attire that is appropriate.

Employees who wear business attire that is deemed inappropriate in this workplace will be dealt with on an individual basis rather than subjecting all employees to a more stringent dress code for appropriate business attire.

Confidentiality for Agents, Staff, Clients

Company & client matters and information are confidential and must not be disclosed without previous authorization from the broker and/or management.

Confidential Information

Any confidential information disclosed to company personnel during the course of their activities shall not be divulged to anyone without the consent of the principal. Confidential information is an extremely valuable and important asset of the company and its clients. Unauthorized use or disclosure could result in serious harm to the company and/or termination of the offending person(s).

Associate Brokers and Sales Associates – Independent Contractor or Employee Status

Unless otherwise specifically provided in the written agreement between the company and associate brokers and sales associates, they are independent contractors and not employees. The company's policy is to have a written Independent Contractor Agreement or Employment Agreement, as the case may be, setting forth the terms and conditions of their relationship with the company before commencing work. Nothing contained in this manual shall impair or affect the independent contractor status of the company's sales associates or associate brokers retained by the company pursuant to the Independent Contractor Agreements.

Company Expectations

- Conduct oneself in a professional manner both in and out of the office.
- Strive to be a profitable associate to the company.
- Compliance with all laws and rules governing real estate licensees.
- Compliance with directions of supervisory personnel.
- Consistent support of company policies and objectives.
- Participate in Agent Development Programs and Office Provided Coaching
- Paying all invoices and dues promptly.
- Assist the company to recruit and grow the office with quality agents.
- Cooperation with outside brokerages and agents.
- Cooperation and respect to all Broker Managers, Agents, and Staff.
- Always acting as a professional.
- Attend office meetings/seminars/trainings/events.
- Complete 14 (or required number) hours of state approved continuing education every 2 years.
- Paying attention to details.
- Maintaining fiduciary responsibilities.
- Making full disclosure of agency status.
- Properly documenting all transactions.
- Responsibility to remain current on all applicable laws, rules and standards of practice.

If an agent is deemed to be off-pace in fulfilling the company’s expectations, the broker/company reserves the right to terminate that agent without prior notice.

Personal Property

Management cannot be responsible for personal property which is lost, damaged or stolen from any of the offices.

Personal Relationships

Personal relationships within the office must be kept on a professional level. Every effort should be made to get along with co-workers.

Pets and Bicycles

Pets are allowed on site but must be contained and must be restrained from disrupting and interfering with staff and clients. All pet owners are responsible for the actions and liability of their pets. Bicycles are not permitted inside the premises and can be locked outside the offices.

Music and Noise

Loud or offensive music that might disturb the work of agents, staff, or clients is not allowed. The same applies to loud conversation and other disturbing noises. Productive work music is highly encouraged.

Termination

The company reserves the right to terminate any employee at will. Sufficient notice shall be given (1 week) unless the employee has committed acts detrimental to the company's success, image, and/or growth, where termination shall be immediate.

Google Work Space

This is the suite of apps available to use through our google business account. Among the most used are gmail, drive, calendar, forms, sheets, docs, & meet. It is important that all staff get familiar and comfortable with using the apps within Google Work Space.

Full Time / Part Time

Full time employment shall be defined as working 35+ hours per week on a consistent basis. Any hours less than that on a consistent basis shall be deemed part-time work. We, as a company, may contract work to Independent Contractors such as, but not limited to, Transaction Coordinating, Graphic Design, etc. While these are outsourced entities, they may be considered part of the RE/MAX One Realty culture. Any overtime hours (hours amounting to more than 40/ week) must be approved by management.

Breaks

Staff shall receive a 15 minute break for part time shifts and 30 minutes for full time shifts. Breaks will be paid according to the company/employee hourly rate schedule.

Benefit Options for W-2 Employees

Vacations / Holidays / PTO (Paid Time Off)/ Sick Days

Part time employees do not receive paid holidays nor do they receive paid vacation or sick time.

Full-time employees receive paid holidays and 1 week (5 days) paid vacation after 3 months of full-time service to the company.

After 1 year of full-time service, a staff member is eligible for an additional 5 days of PTO.

After 2 years of full-time service, a staff member is eligible for 15 days of PTO. PTO then caps. Staff are not permitted to take off more than 5 consecutive days without approval. PTO resets every year with the first day of your year being your date of hire. PTO does NOT rollover each year and can NOT be sold back to the company.

Staff MUST work with each other for coverage to get their time off. That's how it gets approved. DO NOT come to management first before getting coverage and approval from other staff members.

Obviously being sick can't always be planned. Should you need to call out and you are scheduled to work from an office, please communicate this with management as soon as you can and try to get another staff member to cover for you.

IRA

RE/MAX offers all W-2 employees the option to set up an IRA. The company will match up to 3% of an individual's contribution. If interested, here is the site where you can go enroll:
americancentury.com/adpsimple
It's very easy and only takes a few minutes. Once you've enrolled, you can register online at americancentury.com/en/my-account/login.html to be able to view your investments.This info will also be sent to your home via usps mail after enrolling.

Health Insurance

Benefits may be offered to an employee if that employee elects to pay for those health benefits. The company may offer to assist in paying those benefits, but it is not company policy to offer any health benefits at the company's sole expense.

Bring your own Devices (BYOD)

RE/MAX One has a BYOD policy for agents & staff. This means being allowed to use one's personally owned device(s), rather than being required to use an officially provided device(s) to access privileged company information and applications. For RE/MAX One Realty, we feel the benefits outweigh the risks when it comes to this policy.

How the Office Works

Real Estate Agents & Brokerages

The majority of houses are bought and sold using real estate agents to facilitate the transaction. These agents are completely independent and are in charge of running their own real estate business. However, in order to be a licensed agent a person must "hang" their license at a real estate brokerage. Agents make money through commission – they are paid a percentage of the sale price of the house at closing. The brokerage must collect all of the documents related to each transaction and ensure all contracts are legal and in compliance with the appropriate rules and regulations.

Agent Fees

Every brokerage has a different fee structure, but it's usually a combination of a regular monthly fee as well as a percentage of every commission check (known as a split). Agents are the company's primary revenue source, and they have the freedom to leave at any time. Fees can be as low as a few hundred dollars per year at the cheapest brokerages, to upwards of $40,000 at expensive brokerages.

Differences Between Brokerages

Some brokerages provide only the most basic requirements to their agents, and have very low fees as a result. They don't provide any help or support, and they may not even have a physical office space. Other brokerages provide many services for agents, including coordinating their transactions, providing marketing materials, etc. These brokerages tend to have high fees to pay for the associated costs.

RE/MAX One Realty

At RE/MAX One Realty, we focus on training and development. Rather than doing everything for them or leaving them to fend for themselves, we teach the agents how to make the most of their business while staying independent. We want to help our agents grow and improve, but we do not want them to become dependent on us for the routine parts of their business.

Agents as Customers, Employees, and Co-Workers

The relationship between a brokerage's staff and its agents is complex. Like customers, agents are paying for a service. Like employees, they must follow certain rules and do certain work. Like co-workers, they work in the office alongside the staff and both staff and agents occasionally need help from each other. Every agent has their own working style, and their own perception of how this working relationship should manifest. As a rule, all staff members should treat agents as customers first, and let the agents set the tone for how casual future interactions will be. The way a staff member speaks and jokes with one agent may be very different from how they would address another agent. An agent may even choose to have a different relational style with different individual staff members.

Office Space

A small number of agents pay more in fees to have a private or shared office or desk space. This is typically for agents with very high production who need more space for their permanent staff.
New agents joining any office will only have designated office/desk space if they agree to pay for it as part of their contract.

Drop-in Space

As many of our locations are designed to function as shared, drop-in spaces, any agent belongings brought into the office should leave the office with them if they are going to be gone for more than an hour. Agent food can be stored in kitchen areas. Office staff may choose to put unattended items in cupboards at the end of the day if they are left out.

We have a Clear Desk Philosophy for both agents and employees. Our staff models how we want workspaces to look by keeping clutter off of desks and common workspaces. Not only do we believe this makes for a more pleasant environment, but it ensures we present a professional face to clients when they come to meet with agents.

ZipForms – Our Document Collection System

All transaction documents are kept in ZipForms, a platform for real estate professionals to manage and track transactions. While the system is easy for some of our agents, some require additional help. It is common for agents new to the office to need assistance on how to use the system, especially if they haven't used an electronic transaction management system before. Some agents still choose to send documents to an OA, who in turn uploads them to ZipForms.

Social Activities

Because almost every agent works independently, real estate can be a very isolating business. We try to provide several opportunities for our agents to interact. The first is our agent Facebook group (The Office), a closed group where our agents can ask for vendor recommendations, announce new listings, seek help with open houses, and much more. Second is the occasional Happy Hour. These are not done on a regular schedule, but tend to happen about once every two or three months. We alternate between PA & NJ when choosing our happy hour locations. Our training & growth classes and quarterly meetings also are a great place for agents to interact with one another as are our quarterly office meetings. Our first company meeting of each year is an awards ceremony. At this event, we recognize our agents' accomplishments from the past year.

At the end of each calendar year, we host our Annual Holiday Party. This is usually in early December, and the invite is extended to our preferred vendors who sponsor the event and help us to offset the cost (title, lenders, inspectors, etc.).

Staff & Broker Managers

For a complete company list, including Broker Managers, Staff, & Agents, please reference the company roster. The roster also contains everyone's phone numbers, email addresses, etc. Should you need certain info for someone, please reference this resource first.

Agencies & Affiliates

Licensing
Since RE/MAX One operates offices that serve 2 different states, we deal with both the State of NJ/NJ Real Estate Commission & The PA Department of State/ PA State Real Estate Commission.

Bright MLS/Realtor Affiliations
Every agent agrees to be a member in good standing with our local MLS board (Bright) and our local board of Realtors. Should an agent fail to pay, and if the association is seeking the broker for payment, then the broker receives the right to immediately send that agent's license to escrow. The office also has an admin account with some smaller MLSs. These include CMCMLS, Paragon, & SJSMLS. An agent must be a member of these MLSs to utilize them.

RE/MAX Corporate

RE/MAX is an international organization, and the majority of RE/MAX offices are franchise locations. As a franchise, we are required to follow certain rules, such as the strict design rules for yard signs. Agents must pay an annual fee (typically $410 for the year), and the office pays monthly fees for each agent and each transaction. In exchange, we get to use the most recognizable brand name in real estate, as well as a variety of resources provided to agents (such as online courses and marketing material designs).
While agents may choose to switch between RE/MAX offices, we do not actively recruit existing RE/MAX agents.

REALTOR® Association

The word REALTOR® is a registered trademark, and only members of the REALTOR® Association may refer to themselves using this term. The REALTOR® Association provides education and resources for its members, and lobbies for agent-friendly laws both locally and at the national level. Not all agents believe the value is worth the high member fees, which are several hundred dollars per year. Because most brokerages are REALTOR® offices and all agents in them are required to be paying members, the REALTOR® Association is sometimes jokingly referred to as "the real estate mafia."

Lenders

Like agents, mortgage lenders are commission-based and are always looking to attract clients and form referral-generating relationships. Many agents have a preferred lender that they work with, even though the bank or provider a client gets a loan from is ultimately up to the client.

Title & Escrow

Like agents and loan officers, title reps also get paid on commission and need to promote themselves and their company. The title company ensures sellers are the full and rightful owners of the home. Our preferred vendor for title is One Abstract. One Abstract is headquartered in Moorestown and is led by Liz Segal.

Internal Records

ZipForms

As mentioned prior, when it comes to transactional file management and storage, ZipForms is used as the company server and the "final resting place" for documents that are finalized and shouldn't need too many changes in the future. RE/MAX One is a paperless office. While individuals may wish to personally maintain their own paper files, the company stores everything digitally.

Google Drive

Google Drive is used for documents that are both accessed often and changed frequently. Drive handles simultaneous edits between different users, and is a good space for collaborative works. Our staff relies heavily on Google Drive. For security reasons, not all folders are shared with all staff members. Always check with your supervisor before adding new folders in the Drive, as they may already exist in a separate, secured space.

Communication

Inter-Office Communication

Part of teaching by example is sending emails that we would like to receive. Agents are busy and get a lot of email – we want to be as clear and concise as possible. Create clear and obvious subject lines, and include keywords that will allow the agent to find the email via search later. Inter-office communication is crucial. Due to the increase in technology, and the nature of our business, it is imperative that all communication between affiliates and other members of the office and/or cooperating agencies shall be through email, texting and phone. If an important issue is communicated via text, copy and paste a record in an email and save for future reference. It is encouraged to use telecommunications only when time is of the essence. It is advised that this practice should be offered to clients as well. We find e-mail correspondence is much clearer and easier to document than phone conversations.

Staff Communication

Communication between individuals and departments is necessary for smooth operation of the offices. Anything that should be documented, should be done so in an email. The following methods will promote efficiency:

1. Get used to using your mobile phone for company communication, not just your computer.
2. Phone calls and in-person conversations occur often and are more personal; however, it's important to utilize e-mail, text messaging, and Google Hangouts whenever possible for documentation purposes. Please ensure an agent's/client's confidentiality is upheld regardless of what method is being used.
3. When communicating in person, plan to discuss several items at one time rather than meeting several times to discuss individual issues.
4. Routed items should be read quickly and forwarded.
5. Communication between clients/ agents must remain confidential.
6. Weekly staff meetings are held every Tuesday at 9:15am so all staff can touch base. A link is sent out the day before so all can join virtually via Google Meet. In-person staff meetings are occasionally held at one of the offices in lieu of a virtual meeting. Important and pressing matters should be communicated right away. Do not wait for the next staff meeting to bring up such issues.

All staff will be designated an email within the remax-one.com domain upon hire. This is the email they will use for all company email correspondence.

E-mail

Like postal mail and the telephone, e-mail has its own special advantages and disadvantages. Its ease of use is offset by mailboxes filled with unsolicited messages and by hastily composed correspondence that is ineffective or ill advised. Some key points:

• Check your email at least every 2 hours and strive to respond within a 2 hour time frame. We aim for same-day responses as our standard so staff should respond within 24 hours at most. This applies to business days only, not holidays and weekends.
• Do not open attachments from unknown sources. They could contain viruses able to destroy all files on the hard drive.
• Use meaningful subject lines. Precise phrases will alert the recipient to the content of the message and will make it easier for you to locate the message later.

• Be brief and to the point. Restrict yourself to a single subject per e-mail message.
• Include your signature information: name, position, office name, address, R.E. license number (if applicable), phone number, & fax number.
• All measures necessary must be taken to ensure confidentiality when using e-mail and text messaging. If you are not sure confidentiality can be guaranteed, refrain from email or text messaging until confidentiality can be guaranteed.

Mail

Incoming Mail - Mail arrives at the office daily. Prior to reaching the addressee, it will have been sorted. Action should be taken on the mail within a 24-hour period. Care will be taken to honor the notations "Personal" and/or "Confidential." However, occasionally such mail may be opened. Please receive personal mail at your residence address.

Outgoing Mail - Mail leaves the offices once daily.

Personal Mail - Agents and employees are welcome to include their personal mail with the office's outgoing mail, but we do require that you pay your own postage. The same applies to an agent's business mail.

Internet

The offices are provided with wireless high-speed internet access for business purposes only.

Agent's personal web sites representing broker affiliation must comply with copyright and trademark regulations (including those of RE/MAX International) and must refrain from forbidden activities such as: defamation, sexual harassment, racial discrimination, pornography, and wire or internet fraud, among others. Agent's personal web sites representing broker affiliation must be submitted to the broker for acceptance prior to publishing in the web and at all times must comply with state licensing law. The agent is responsible for maintaining an approved site.

Sending Company Emails

Another great feature of the Google Workspace is that it allows us to set up email groups. These groups are maintained by the staff to ensure they are complete and up to date. They make sending company correspondence very easy. The email groups we use are listed below:

- remaxonepa@remax-one.com (all PA licensed agents & all staff members)
- remaxonenj@remax-one.com (all NJ licensed agents & all staff members)
- staff@remax-one.com (all staff members and John)

*all staff members are included in all groups so that info is not missed. Certain emails may not always apply to all staff members. If that is the case, those emails can be filed.

Google Hangouts & Texts

Available as an app through Google Workspace, Google is used to keep in touch with one person or a group. Available on mobile and desktop, is the preferred texting method within the company because of this integration.

Google Meet

Available as an app through Google Workspace, Google Meet is a high quality video conferencing solution that is very easy to use. Our weekly staff meetings are conducted via Google Meet and it is a great resource for virtual meetings, training sessions, etc. To start a meeting via Google Meet, simply click on the Meet app, click 'join or start a meeting' then follow the prompts. The link and access info that google provides can be shared via email, text or hangout. Google meets can be created ahead of the time they are needed.

Phones

We want to make sure the phones are always answered during business hours and that voicemail is checked regularly. This is to ensure that our agents can always reach us if needed.

Phone Etiquette

- Greeting: "Thank you for calling RE/MAX One, how may I help you?" It is important that a professional attitude be expressed during a telephone conversation. To comply with trademark standards and Real Estate Commission requirements and prevent customer confusion, answer with the full office name ("RE/MAX ONE Realty"), not just "RE/MAX."
- How the phone is answered and how calls are handled leaves an impression on our clients, potential clients, and the agents that we work with – it is important that this impression be a good one.
- Answer your telephone promptly. If you must leave the phone, use the "hold" button; never lay the receiver down with an open line. Never leave a customer on hold without going back on the line periodically.
- Smiling while on the phone, although the caller may not see it, translates to a positive voice inflection.
- Always be polite, courteous and friendly.
- It is not permitted to make long-distance (outside continental U.S.) personal calls at the office.

Voicemail Messages

- To check company Voicemail directly from a physical phone, the code for all office phones is the same. Dial 899, the password is 147258. From there, simply follow the prompts. Company voicemails will also be received by our admin email account. (admin@remax-one.com) This is checked throughout the day.

- Voicemails to your own personal extension are set up to be received via the email address we have on file for you. You can check voicemail by simply logging into your email.
- Return all calls as quickly as possible.

Calls for an Agent

- Most calls received at the office are for agents – if someone calls for an agent, forward the caller to the appropriate extension. If the caller is inquiring about a property but doesn't have an agent's name, if you don't know who the agent is, ask if they mind being put on a brief hold while you look up the agent and transfer their call. Direction for forwarding a call can be found below and by the main phone in each location.

Calls about an Agent

- There are those occasions where a phone call is received from someone needing to file a 'real estate consumer issue' which is essentially a complaint regarding an agent. Staff are to handle these calls as follows:
    - take the caller's name and phone number
    - find out the property address and/or all parties involved
    - the date of the issue (if applicable)
    - a summary of the issue, the more details the better
    - Note - there will be callers who are difficult about giving all this info. Please assure them that we have almost 200 agents across 7 offices. This info is needed in order to direct it to the appropriate broker manager.
    - Once all this info is captured, this info needs to be sent via EMAIL to John and the approp broker manager. Please put "URGENT" ahead of the subject.

Transferring Phone Calls

- Press the transfer button (it is an image of 2 phone with an arrow between them)
- Dial the extension of the person/ office you wish to transfer to
- Hang up the phone
- Press the transfer button a 2nd time

Faxes

We use both a physical fax machine (located in the Moorestown office) and an e-fax system, received in the admin email (admin@remax-one.com). Staff will then forward received faxes to the appropriate person. Agents should encourage their clients and other parties to use cover pages to ensure all faxes are forwarded in a timely manner. Because faxes must be forwarded manually, agents can only receive faxes during regular business hours. Our fax numbers are 267-960-2250 (efax) & 856-866-5532 (physical machine at Moorestown).

Office telephones, copiers/printers, fax machines, and resource computers must be used for real estate work only.

Calendars

All scheduling is done via Google Calendar. The Training & Events Calendar (accessed at ONEtrainingcalendar.com) is the one the agents can see and is used for office meetings, events, birthdays, etc. Internally, the broker managers and staff use calendars only visible to them to manage in-house settlements, staff schedules, etc.

When in doubt..

If a staff member is unsure of how to address something, they must consult with the staff as a group, not one individual staff member. It is easier for all parties to follow along and offer advice.

Training/Office Meetings

Any training, closing, or other event must be properly scheduled in advance (if possible) to ensure there is no disturbance to agents or office staff.

Staff members are responsible for making sure conference spaces and training rooms are set-up and ready for any events that are scheduled that day.

Company Meetings are held quarterly - one per season. This allows us to have 3 company meetings each year. There is not a winter company meeting due to our holiday party. Sufficient notice will be given for the time, date and location of the meetings. Most company meetings are at 10AM and almost always on Wednesdays. Any time or date changes will be communicated via the Office Facebook Page and email. These meetings are held off-site and food is provided. As much as possible, meetings should be kept informative and everyone is encouraged to participate.

Please take this opportunity to use these meetings as a group session to aid in any business situation that arises. This is also an excellent opportunity to go over any suggestions or concerns you have. Attendance is strongly encouraged.

Recently, due to COVID-19, we have taken to conducting training sessions and meetings virtually for the health & safety of all involved. For such training sessions we utilize Zoom or Google Meet.

Office Appearance & Taking Care of the Office Spaces

Opening and Closing Tasks

Opening the Offices*

Every morning the following should be completed by a staff member:

1. Unlocking appropriate interior and exterior doors.
2. Turning off the security system (if applicable).
3. Turning on lights and copiers.
4. Water flower boxes (Society Hill only).
5. Tidy the office (if needed - wipe down surfaces, push in chairs, etc.).
6. Brew coffee (Moorestown only).
7. Checking voicemail.
8. Review calendar.
9. Checking email.
10. Checking bathroom supplies and trash.
11. Checking office supplies.

Throughout the day

1. Push in chairs, straighten desks.
2. Put away any loose items found around workspaces (pens, notepads, cords/power strips, etc.).
3. Check/ distribute mail.
4. Check for voicemail.
5. Sanitize any desk, conference space, etc. that was used.

Closing the Offices*

Every evening, the following should be completed by a staff member before closing the office:

1. Interior and exterior doors are locked/secured.
2. Radio, lights, copiers, calculators, computers, etc., are turned off.
3. Coffee machine is turned off.
4. Empty/ rinse coffee pot and turn off machine (Moorestown only).
5. Heat/AC is lowered/raised or turned off.
6. Push in chairs, straighten desks.

*Opening/ Closing tasks are not limited to the above. Each office may also have location specific tasks that need to be completed each day at opening and closing. Please refer to the task list at each location for details.

Office Appearance, Cleaning and Organizing

Some of our agents only see the office a few times a year, so their perception of the office space may be based on a single, unexpected visit. Staff must ensure that every agent visit is a positive one. This also applies to clients, vendors, etc. Not every visit to an office by an agent, client, or vendor is going to be a scheduled one which is why it is very important that the office always be kept as if a visitor is being expected.

PRO TIP: Cleaning and sorting can be a good way to avoid burnout. If you feel like you've been sitting too long, take the opportunity to walk through the office and find something to fix up or wipe down. Weekly maintenance tasks don't all need to happen at once.

The offices are professionally cleaned every other week but if something needs to be done in the interim (i.e. wiping down the glass door of fingerprints, sweeping noticeable debris), there are some basic cleaning supplies kept at each location. If you can't locate something, just ask the team.

We love clear desks, especially up front. Agents comment on it so we know they notice. Try to keep work off your desk as much as possible, and make sure everything is put away at the end of the day.

Unplanned Office Closures

Occasionally, there are all-office closures due to inclement weather that can't be predicted. These instances will be communicated through email & the facebook group.. We will not risk the safety of our agents, staff, and managers by opening if the weather possesses a threat to that safety. Our company is set up to run virtually and will still be able to carry on business.

Mail

Mail is received daily at each location (except on Sundays and holidays). Mail must be distributed promptly once it is received by whichever staff member is at the office that day. Agent mail is distributed to their mailboxes. We do not email agents to inform them of mail. However if an agent's folder is getting too thick, we might send a reminder email asking them to pick up their mail.
The Office reserves the right to intercept and open any item sent to our business address if it appears important (ie. deposit checks, commission checks, legal matters, etc.) Many agents do not come into the office regularly and therefore are not checking their mail regularly. Since these items are time-sensitive, we can't have such important items sitting in unchecked mailboxes.

Packages

In order to keep a clean front desk, all incoming packages should be dealt with within an hour of arrival. Agent packages can be kept by the Agent Mail bins if the agent does not have their own office/desk., and the agent should be notified via email that they have received a package. Office deliveries such as supplies should be promptly put away and the boxes broken down.
Once a month, check for packages that have not been picked up and send a reminder to the agent.

Supplies

Supply orders are placed on a weekly basis, typically on Tuesdays. 'Supplies needed' is a talking point in the weekly staff meetings. Exceptions can be made should an office run out of necessary supplies and have to order right away (i.e. copy paper). It is up to the staff to ensure we keep adequate supplies that will last.

PRO TIP: Keep at least one ream of paper in a locked or hidden spot. That way you'll always have a spare ream around and you'll know immediately if we are out of paper.

Staff Work Spaces

In order to maintain a well-organized, pleasant environment, staff are asked to adhere to the following:

1. Your desk surface and drawers are well-organized and orderly.
2. Only necessary supplies/files pertaining to your current work should be kept at your desk.
3. Each work area will be cleared of all paperwork when leaving at night. We maintain a "clean desk" policy.
4. The copier area should be kept uncluttered.
5. The computer areas should be kept uncluttered.

6. Loose papers should be disposed of and confidential papers should be filed away or shredded.

Break Room/Communal Areas

Each individual is responsible for his or her own clean-up. If you use the last of anything, please notify the appropriate individual so that it can be replenished or refilled.

Please make sure the coffee machines, tables, microwaves, and refrigerators are always kept clean and sanitary.

Make sure your food does not remain in the refrigerator for more than 2 days, as we reserve the right to dispose of any items remaining in the refrigerator for extended periods.

When using the microwave, please resist bringing strong odorous foods on the premises. Food should be eaten in the break rooms or at your desk. The managers will not, however, tolerate food left around any areas. At no times shall food be eaten in the conference area unless brought in by management for a specific occasion (ex. meetings, closings, etc)

Please wash your glasses and keep the tables and areas clean after you finish. Garbage must be disposed of. **Please note - due to the Society Hill office's close proximity to several bars and restaurants, any food trash must be disposed of in an outdoor trash bin.

Conference Rooms

Client meetings can happen at any time, sometimes without warning. We want to ensure that the conference rooms are clean, organized, and inviting at all times. Regular upkeep includes:

- Wiping down the table (look for coffee rings and fingers smudges especially)
- Pushing in all the chairs
- Clearing off old cups, glasses, paperwork, etc.

Agents can reserve conference rooms ahead of time by contacting any staff member. Reservations are added to the Closings/ Meetings Calendar. The Office Admin is in charge of making sure the conference room is open and clean before each reservation.

For evening and weekend reservations, it is helpful to leave a note on the conference room door with the reservation details so other agents know that the room is reserved.

Greeting Guests

When a guest arrives:

1. Greet them and find out what brings them into the office.
2. Find the appropriate agent and let them know that their appointment has arrived (always inform them in person if they are on-site)
3. If they have an scheduled appt, show them to the appropriate conference space.
4. Offer to get the guest water, coffee, or tea.

Signs

All agents must use the approved RE/MAX sign designs – designs can be found on the suppliers websites. Any real estate sign company should have these designs available.

Building Notices

Office Admins are the primary point of connection with the landlords, which means they are responsible for communicating building notices to agents, such as parking closures, key changes, office-specific notices, etc.

Showings Appointment Center

RE/MAX ONE Realty takes property showing appointments via the out-sourced office web-based Showings Appointment Center (ShowingTime).

The cost is built in as part of shared office expenses and may be subject to change. Broker/Company reserves the right to terminate a group account with service. Individual agents may remain customers but must establish their own account and be responsible for those payments.

Transaction Coordinator

Transaction coordinating is performed once a purchase agreement is fully executed, regardless of which side an agent represents. The following are a list of tasks (not limited to) performed by our transaction coordinator(s)**:

- Confirm Consumer Notice was signed by all parties.
- Confirm either buyer agency disclosure or listing contract was signed.
- Check agreement of sale for all signatures.
- Confirm ancillary business disclosure is signed
- Verify down monies, track dates and ensure copies of deposit check(s).

- Verify deposit money notice signed (co-op only)
- Note dates on agreement of sale for mortgage approval, certifications, inspections, etc.
- Order inspections (client must sign form agreeing to use such inspector)
- Order title work (when we represent the buyer).
- Get SS# and payoff info to title company
- Send settlement letters/notices to all parties.
- Coordinate with Title Company.
- Review title commitment and assist with clearing title.
- Originate and send commission invoice and charge sheet for closing
- Get deposit out of escrow
- Assist agent as needed to close.

**A $295 fee charged to a buyer and $295 fee charged to a seller is due as a broker's fee at settlement (unless your office plan states otherwise). This charge will be collected from an agent's commission if not collected from the client on the ALTA settlement sheet. This charge covers administration costs to process a transaction, software for the transaction, broker time, loss from terminated transactions, document storage, and supplies.

Recurring Tasks

<u>Birthday Cards to Agents</u>

- Write a birthday wish in the card – send it to the agent's personal address (found in LW) a few days before the agent's birthday. As a fun little gesture, we include lotto tix in the cards for the state that agent has their primary license with.
- Schedule social media posts for upcoming agent birthdays

<u>License & Roster Scrub</u>

Once a month we do a roster scrub not only to ensure we are up-to date but to make sure there aren't any problems. It also allows us check-in with pending items. This is usually done towards the middle of the month to avoid overlapping with end-of-month tasks. This includes licenses, RE/MAX, Nexxus in NJ and GPAR in PA, Bright MLS, and our own roster (accessible in the agent resource folder).

<u>Annual RE/MAX Awards</u>

At the beginning of the year, RE/MAX gives out awards for agents and offices.

The first time an agent receives an award, RE/MAX sends the office a generic plaque with a nameplate that can be attached to personalize the plaque to the agent. The agent will also receive a small medallion to attach to their plaque, indicating which club level they've reached. The next year, RE/MAX will only send the medallion, so the agent can attach it to the existing plaque.

Not all agents choose to pick up their awards, however we store the unclaimed awards in the offices in case they wish to have them at a later date.

Executive Club Award
Paid commissions in a given year totaled $50,000 to $99,999.

100% Club Award
Paid commissions in a given year totaled $100,000 to $249,999.

Platinum Club Award
Paid commissions in a given year totaled $250,000 to $499,999.

Chairman's Award
Paid commissions in a given year totaled over $500,000 to $749,999.

Titan Club
Paid commissions in a given year totaled $750,000 to $999,999.

Diamond Club Award
RE/MAX Sales Associates who have earned in excess of $1 Million in paid commissions within the RE/MAX System.

Lifetime Achievement Award
RE/MAX Sales Associates who have: 1) Earned in excess of $3 Million in paid commissions within the RE/MAX System, 2) Completed 7 years of service with RE/MAX, 3) Attained the Hall of Fame Award

Circle of Legends Award
RE/MAX Sales Associates who have: 1) Earned in excess of $10 Million in paid commissions within the RE/MAX System, 2) Completed 10 years of service with RE/MAX, 3) Attained both the Hall of Fame Award and Lifetime Achievement Award

Agents

HUD

Instructions for Both PA HUD Registration and NJ HUD can be found in the agent resources folder.

<u>Agent Commissions</u>

Commissions are paid to the RE/MAX ONE Realty Sales Associate within 1 to 2 business days (from the day that he or she turns in a COMPLETE FILE). Complete files include compliance docs and commission payment (check or wire). Incomplete files may delay payment of agent's commissions by a broker.

In the event that a Sales Associate has fallen behind in paying his or her monthly contribution, it is the management's discretion to deduct the entire or partial payment from any commission the Associate has earned. Any balance that is remaining is to then be issued to the Sales Associate.

Any commission split amongst the Sales Associates is determined by the agreement of the parties. It is the agent's responsibility to ensure the commission check is accurately divided upon issuance of the check. Once an agent accepts the check, that agent accepts the terms of that disbursement and releases RE/MAX ONE Realty from any further obligation regarding a commission split not defined in the Independent Contractor's Agreement. All agent commission percentages to office will be calculated by using a minimum of a 2% commission calculation. Should an agent decide to accept a commission lower than 2%, then the office portion of the commission will be calculated on 2%. Should an agent accept a commission higher than 2%, then the office portion will be calculated on that percentage amount.

The listing commission versus the selling commission between cooperating offices is determined by the agreement between the offices.

Commissions other than cash: In the event that a commission is taken that is not received in cash (for example, a Sales Associate decides to carry a second mortgage on the property), it is important that the Associate contact the Broker with the details on how to work that transaction. Oftentimes, if the commission is being paid and the Sales Associate is loaning it back to the buyer, then actually that can be considered earned income that the Sales Associate has received, and by law income taxes apply. If the Associate can work out a deal where the seller pays him or her their commission out of his or her proceeds that come in monthly, then generally speaking, taxes are paid on that and installments are received. It is very important the Sales Associate make arrangements for this prior to the closing of the transaction.

Reasons for Commission Delay

1) Late Check: Most escrow companies send commissions via courier or overnight delivery, so the office gets them the day of closing or the next business day. However some companies (especially smaller companies and law firms) will send checks via regular mail, in which case it takes several days to reach the office.
2) Incorrect Check or Wire: Occasionally an issuer will make a mistake in the check or wire, and it must be reissued. Depending on the problem and the company, it may take several days to resolve. The office always informs the agent of such problems (unless the issuer is able to deliver a corrected check the same day).
3) Missing Documents: If an agent is missing documents , their commission payment may be delayed.
4) Bank delay: Depending on the size of the check and the policies of the agent's bank, there may be a delay between when we initiate the ACH (direct deposit) and when the agent sees the money in their account. This delay will likely be the same with every check so long as the agent continues to use that bank. However this is becoming increasingly rare, and most agents see their money the day after we initiate, which is usually one day after we receive the check.

Rules for When Documents are Required

Any time our agent's name appears as the agent or co-listing agent on either the contract or the MLS, we are required to collect all the normal documents (as listed in ZipForms.)

Agents New to the Business

Agents who are brand new to the business often require a lot more help than seasoned agents who are just switching brokerages. We scheduled several training series and individual training sessions throughout the year that are not only key for new agents but also a great refresher for the more seasoned agents. New agents are most likely to thrive under the guidance and leadership of a team.

The retention rate for brand new agents in real estate is very low. Of everyone who gets their real estate license, only 20% will choose to renew after two years. At RE/MAX One, we aim for a realistic (but ambitious) rate of 50%.

Business Cards

Agents are allowed to have whatever business cards they want, provided they follow the RE/MAX brand specifications. Agents are encouraged to leave some business cards at their respective office(s).

Printer Drivers & Assistance

For the most part, the copier/printer/ scanners are the same (or very similar) models across all office locations. However, to be able to use each individual machine for printing, you have to install a driver for each different machine. Once this is done, you can print from that machine anytime. The instructions for installing the drive on either a MAC or a PC can be found in the Agent Resources folder. Should you run into any issue during the process, Canon has a help desk line available to us. They are super helpful and can be reached at 1-(800) 355-1385.

Available Resources

Max Center - available to all RE/MAX One agents. Staff should be familiar with it as well.

MaxCenter can be found at remax.net or maxcntr.com, and is the internal resource site for all RE/MAX agents. Users are managed by RE/Max Corporate. Design Center, RE/MAX University, booj, etc. can all be accessed through both sites.

*For any assistance with MaxCenter or the apps within it, RE/MAX Product Support is a great Resource. They can be reached in the following ways:

- text or call 1-888.398.7171
- email productsupport@remax.com
- Submit a ticket through the ‘Support Services’ app in MaxCenter

Agent Facebook Group

There is a closed Facebook group for all agents and staff, and it is primarily used for communicating between other agents. If an agent wants to publicize their listing, they can also do it here as well. You will be invited to this group upon hire.

Recommended Vendor List

Every so often we look through the suggestions made on Facebook and add them to a list of recommended vendors, which is kept in Google Drive. This resource can be viewed at https://rem.ax/_vendors

Info for Agents & Answers to Some Common Questions

Are there rules about business cards and signs?

Agents are allowed to use whatever business card design they would like, as long as it follows the MLS and State License rules.

RE/MAX requires all agents to use approved sign designs. Some RE/MAX agents choose to have signs made that do not match RE/MAX specifications, and are not explicitly penalized for it. However if any complaints are made against the agent, they must remove their signs from all listings immediately and cover any required replacement costs.

How do I order business cards?
There are a variety of companies that offer RE/MAX compliant branded business cards. Some recommendations include One ABtract's Marketing Department, Moo, VistaPrint, & Magnets USA. For a complete list, visit shop.remax.net.

What classes does the office have?
Consult OneTrainingCalendar.com for the most up-to-date schedule of events going on within the company. Email, text, and Facebook reminders are sent out as well.

Can I get a Proof of Insurance, W-9, Etc.?
These docs and more are available in our agent resource folder (rem.ax/agent_resources). Anything in this folder can be given out to agents when they request it.

License Questions
Most license transfers and renewals take a few weeks to arrive. The status of any license can be checked online using the appropriate state's site search. This is also an easy way to find any agent's license number. A call or email to the State Real Estate Commission can help if an agent's license is delayed.

Do we have Preferred Lenders & Title Companies that we recommend to clients?
Our recommended title company is One Abstract. Their physical office is located within the Route 38 office. Agents and clients are free to use whichever lender or title company they choose.

<u>Agent Fees & Commissions</u>
<u>Agent Monthly Contribution</u>
Depending on their ICA, some agents will receive an invoice monthly from the company. We refer to the charges on these invoices as their Agent's Monthly Contribution.
There are several options given to the agents to satisfy any amount due. These are as follows:

- Plastiq - Plastiq is a service that allows agents to use a credit or debit card to make payment to us. Plastiq will then send us a check. They do charge a processing fee on their end for the service To access, use this link: rem.ax/plastiq

- Auto-debit - if an agent has opted to receive commissions via ACH, they also have the option to have us schedule auto-debits. Withdrawals are debited from the same account that their commissions are directly deposited to. No fee is required for this service.
- Agents can opt to allocate a full or partial commission to pay an invoice.
- Check - personal or bank checks can be made payable to RE/MAX One Realty
- Credit card - Agents can fill out a credit card Authorization for us to charge their card for payment. There is a 5% processing fee for this service.

RE/MAX Annual Dues
These are not optional, and they cover things like national and international advertising of RE/MAX, as well as all of the resources available in MaxCenter.. Bills come in the mail and agents pay RE/MAX directly.

What is the Children's Miracle Network option on the commission disbursement?
RE/MAX and the Children's Miracle Network are affiliate partners, and CMN has a system where agents can send out honor cards to their clients if they donate $30 or more ($60 if the card is being sent internationally). If an agent wishes to make a donation from a commission they receive, they can note it when filling out their commission disbursement. The office will make the deduction when processing the commission payment and hold the funds until we issue payment to CMN- usually once per month..

When will I receive my commissions?
Our official promise is within 1-2 business days after receiving a complete file. A complete file means all compliance docs have been submitted to the office or uploaded to Zip and commission funds have been received by the office.

Marketing & Logos

Marketing
ONE Abstract, our in-house title company offers a variety of marketing services available to the agents. To place an order, email marketing@oneabstractservices.com. All requests must include the following:

- Agent name
- Company
- Agent's contact info (phone, email, website, etc)
- Property address (if applicable)
- What you'd like to order

Available marketing materials include postcards, business cards, flyers, email blasts, listing reports Pricing is very reasonable compared to other marketing/print companies. Since prices are subject to change, specific pricing can be requested anytime by emailing the above address.

Logos
Max/Center has a variety of general RE/MAX logos that can be downloaded. You can find these in the "Marketing" app. There are also RE/MAX One specific logos available for download in the agent resource folder or at rem.ax/one_logos

Agents Joining or Leaving the Office

Agent Onboarding
Onboarding is broken down into smaller tasks and assigned to a staff member. The Director of Agent Services (along with the broker/manager of the new agent's primary office) will handle the bulk of the Onboarding process however, All staff members have a role to play in the onboarding process. The Director of Agent Services will monitor the project for each new agent to be sure all tasks are being completed and in a timely manner. Regardless of your role in a new agent's onboarding, it is extremely important that all tasks are completed (or provided with a status update) as quickly as possible. Real Estate agents are very mobile and often require multiple follow-ups on things. This is why broker managers & staff are here to assist with. When reaching out to an agent an good rule of thumb we use is the following: Day 1 - reach out, Day 3 follow-up, Day 5 - make a phone call. At this point, it may be time to involve the broker manager of the new agent's primary office.

Note: Sending one email once is not acceptable. It is our responsibility to get new agent's onboarded, not theirs, so communication must be constant and consistent until a task is fully complete.

Agent Offboarding
The Agent Offboarding project can also be found in asana and contains all tasks that need to be completed when an agent leaves the office.

Agent Leave of Absence
Leave of Absence applies when an agent needs to go inactive for a prolonged amount of time, but does not want to suspend their license or be removed from the RE/MAX system.

If it is under 90 days:
Through MaxCenter and the RE/MAX office portal, submit an Associate Status

Change Request for LOA (Leave of Absence). That will allow you to choose the effective dates.

If it is over 90 days:
RE/MAX corporate will need to be contacted to approve. Be sure to get proof of approval.

We at RE/MAX ONE Realty would like to thank all in advance for their efforts and hard work to help achieve our goals and mission! Thank you!