Keller Williams Allentown

AGENT SUCCESS GUIDE

2025

610-435-1800
www.kwarocks.com
1605 N Cedar Crest Blvd, Suite 309
Allentown, PA 18104

WELCOME TO

KW ALLENTOWN
KELLERWILLIAMS. REAL ESTATE

Welcome New Associates!

These resources are tailored to help you get up and running as quickly as possible. While not an end-all, be-all list, this is a jumping-off point to familiarize yourself with what's available to you as a member of the Keller Williams family.

http://www.kwconnect.com/page/growth/new-associates

https://www.kwarocks.com

Additionally, this Agent Success Guide will serve as a quick reference for you of helpful information specific to your Market Center that you can access at any time.

We're so excited to be in business with you!

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MARKET CENTER

KELLER WILLIAMS REAL ESTATE ALLENTOWN

610-435-1800

frontdesk466@kw.com

1605 N Cedar Crest Blvd
Suite 309
Allentown, PA 18104

STAFFED HOURS: MONDAY - FRIDAY 9:00 AM - 5:00 PM

MARKET CENTER #466

LEGAL NAME: LEHIGH VALLEY REGIONAL REALTY, LLC

EIN: 54-2152866
A COPY OF THE W-9 CAN BE LOCATED ON THE KWA AGENT SITE:
HTTP://WWW.KWAROCKS.COM

E&O INSURANCE CARRIER: MV INSURANCE SERVICES
FOR A COPY OF THE E&O CERTIFICATE, PLEASE CONTACT THE MCOM

BROKERAGE PA LICENSE: RB065524

PRIMARY BOARD AND MLS: GREATER LEHIGH VALLEY REALTORS AND GLVR MLS

GLVR MATRIX MLS OFFICE ID: KWILA
FOR INFORMATION ON JOINING AN ADDITIONAL PA MLS, PLEASE SEE THE DIRECTOR OF AGENT SERVICES

BRIGHT MLS OFFICE ID: KELWLMA

MAR PA NAID FOR HUD HOMESTORE REGISTRATION: LHGHVL2866

MARKET CENTER

KELLER WILLIAMS REAL ESTATE ALLENTOWN IS PROUD TO BE A PART OF KEYSTONE PARTNERS GROUP (KPG)

Keystone Partners Group

From the launch of the first Keystone Partners Group Keller Williams Real Estate office in the spring of 2001, the organization has since expanded to fourteen companies serving much of eastern Pennsylvania and western New Jersey. Over 1,500 agents strong, KPG now maintains a multimillion dollar profit sharing history and an annual gross sales volume exceeding two billion dollars. This remarkable track record places KPG as a national industry leader in productivity, profitability, growth, and culture, that's rapidly becoming the dynamic multi-office company of choice for real estate professionals and business leaders seeking transformational growth and opportunity.

Learn more about KPG here:
https://keystonepartnersgroup.com/

MARKET CENTER

Public Wi-Fi Network: PUBLIC-KWWALLENTOWN-WIFI
Password: 6104351800

Your access to the private Wi-Fi network, including printing capabilities, will be set up by Reppert Factor IT Support. A setup ticket will be opened on your behalf by the Leadership Staff.
You will also be assigned an ID code for the copier/scanners. Each agent gets 200 free B&W prints/copies per month, $0.06 per page after 200. Color prints/copies are $0.29 per page. Billable prints/copies are added to your monthly agent invoice.

Scanner: There is a SCAN AND SEND option on the copier menu. Documents can be scanned and sent via email. The copier address book has email addresses for all the agents in our Market Center (alphabetical by first name), or you can manually enter any email address.

Agent Mailboxes/Files: Located in the filing cabinets in the copier room. Please check your mailbox regularly.

Business Cards: A set of 100 business cards will be ordered for you by a Director of First Impressions after your contact information/photo is confirmed. These will be placed in your agent mailbox once created.

Monthly Team Meeting: Held at the Market Center on the 3rd Wednesday each month at 12:00 pm. All agents are encouraged to attend in person or watch live in our Facebook group.

Agent Leadership Council (ALC): The ALC meets the 2nd Wednesday each month at 12:00pm. All agents are encouraged to attend to get a full understanding of how a Keller Williams Market Center operates, however only ALC members can participate.

After-hours Market Center use: The ROMA Center hours are Monday through Friday 6am to 9pm, Saturday from 9am to 2pm, and closed on Sunday. If you need to meet clients or use the office facilities outside of our posted business hours, please speak to the MCOM , Assistant Team Leadership or the Team Leader.

Transaction paperwork: All transaction paperwork must be submitted to the Market Center electronically for Compliance review through Command. See the section of this guide regarding "Compliance" for details.

Listing Input and Maintenance: Agents are responsible for input and updates to their own listings in MLS per MLS guidelines. Make sure you have Listhub enabled so your listings will syndicate properly to the KWLS and out to 3rd party websites. Agents are also responsible for entering showing instructions in ShowingTime for showing appointment scheduling.

LEADERSHIP

MEET YOUR LEADERSHIP:

Craig Sachse
Team Leader

craigasachse@gmail.com
570-954-3543

Growth Coach
Recruiting
Consulting
Training

James Samois
Broker of Record

jim.samois@kw.com
484-641-3313

Risk Management
Contract Assistance
Transaction Strategies
Compliance
Market Center, Boards,
MLS, State
and National

Amy Wakefield
Market Center Office Manager

awakefield@kw.com
610-745-4481

Market Center Operations
Market Center Financials
Agent Support
Agent Onboarding
Compliance Coordinator

Sami Lerit
Productivity Coach

samilerit@kw.com
973-524-1323

Launch Coach
Consulting
Training

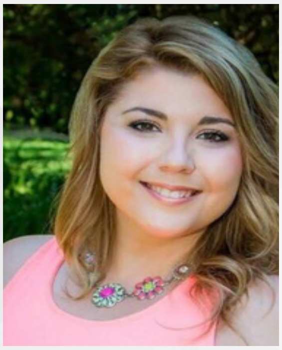
Hannah Gold
Director of First Impressions

frontdesk466@kw.com
610-435-1800

Greet and Assist
Guests/Agents Conference
Room Reservations Training
Calendars
Social Media Manager
Concierge

LEADERSHIP

MEET YOUR LEADERSHIP:



Katie Jo Remmel
Director of Transitions
& Technology

kremmel@kw.com
610-739-0216

Mega Agent & Team Transition Technology Training and Workshops Director of Marketing Departments

James Wakefield
Market Center
Technology Trainer

jwakefield@kw.com
610-745-4480

Technology Training
Command Help

PARTNERS

MEET YOUR PARTNERS:

KPSS
Keystone Premier
SETTLEMENT SERVICES
An Affiliate of Title Alliance, Ltd.
An ESOP Company

ONE SOURCE
CENTRAL SERVICES

MM
MOVEMENTMORTGAGE

SAFEGUARD
HOME & AUTO
INSURANCE

AMERICA'S PREFERRED®
Home Warranty, Inc.

MV
Insurance Services

American
Home Shield®

HOME FRONT
MORTGAGE

Inspection Services
PRO-SPECT
Your Professional Property Inspector
10
CELEBRATING TEN YEARS IN BUSINESS

How to Refer

Easy as 1-2-3

SAFEGUARD HOME & AUTO INSURANCE

1. Send Blayre your buyers contact information

Name
Address
Email
Phone

Send to

Send within 5 days of signed contract.

Blayre Scorzetti
blayre@safeguardha.com
908-303-0205

2. Warm intro

Inform your buyer they will be recieving:

- Prices from over 15 companies at their fingertips
- Loss History Report for full disclosure.

3. Prevent lender from using their own insurance contact.

Let your lenders know the insurance company you own will be working with your buyer.

- Lenders often have their own insurance contacts reach out for a referral fee.
- Sync up with them and let them know your company will be handling your buyer.

Full Service Transaction Management Solutions

If you are looking to save time and money in processing your transactions, we have the solution for you.

1 Source Transaction Managers are exceptionally trained and have experience running transactions at high levels.

With their knowledge of CRM systems and years emersed in the real estate transaction, you can be sure that yourself and your clients will receive five star service.

OUR SERVICES:

TC Management

$375

- Document management
- All Parties Communication
- Daily Transaction Updates
- SchedulingDatabase
- Enrichment
- Business Growth

Get in Touch with
Our Transaction Solutions Managers

CONNECT NOW

1Sourcecs.com

FULL SERVICE TRANSACTION MANAGEMENT SOLUTIONS

DOCUMENT MANAGEMENT

We provide secure and superior document management for your transactions. From contracts, disclosures, and brokerage specific documents, we ensure that all are in compliance.

COMMUNICATION

Communication is key for every real estate transaction. We maintain open lines of communication between all parties. We send updates to you and your clients through the process and set proper expectations.

SCHEDULING

Each transaction has its specific date sensitive requirements and schedules. We verify that all required scheduling is done and all deadlines are met.

HELPING YOU BUILD A BIGGER BUSINESS

Your Transaction Solution Managers are highly tech-enabled. We will assist in adding imperative information in helping you build your relationships with your clients to gain referrals.

1 Source Central Services | 1SourceCS.com

WHAT IS **CULTURE?** *by Kay Evans and Mo Anderson*

1. Making decisions that are right for the Market Center regardless of individual impact—there is no "I" in TEAM
2. Following the model
3. Not only learning but living the WI4C2TS
4. Putting God and your family first, and the business second
5. Understanding that the higher purpose of business is to give, share, and care
6. Being the best co-op associate possible; always respecting other associates
7. Taking a stand on an issue that may not be popular, but is RIGHT
8. Helping someone in the Market Center willingly and with a smile, even though you are busy
9. Doing the right thing without wanting to be recognized or acknowledged for it
10. Committing to sharing knowledge in the Market Center through mentorship or teaching
11. Participating in RED Day annually and participating in community service locally, throughout the year
12. Committing to donating to KW Cares
13. Paying a struggling associate's fees anonymously
14. Complimenting others regularly
15. Being a part of the solution and not the problem in a Market Center
16. Taking the high road on confrontational issues or points of difference
17. Handling a fellow associate's business when personal or family illness occurs
18. Paying a struggling associate's tuition to a class that may impact the associate's productivity
19. Living up to the covenant if you are on the ALC
20. Representing the Market Center and the company in a positive way—always smiling at others in the Market Center regularly
21. Staying home if you're having a bad day attitudinally
22. Speaking without profanity
23. Avoiding disparaging remarks about anyone, especially associates who leave KW to join a competitor company—after all, many times they COME BACK
24. When lead generating expired listings NEVER be critical of any previous agent
25. Your social media posts should avoid controversial topics that are inappropriate for business
26. Responding to clients' calls and concerns in a timely manner
27. Considering the other person's viewpoint before responding
28. Committing a random act of kindness every day
29. Being willing to walk away from a transaction that compromises your principles
30. Being considerate of the Market Center staff
31. Paying your Market Center bills on time
32. Not looking for loopholes in Cap and Royalty payments
33. Honoring the policies and protocol of the Region regarding recruiting
34. In building a Market Center, never recruiting associates from another KW Market Center
35. In building a team, never recruiting associates from within your own Market Center without first discussing it with and receiving your Team Leader's prior approval
36. In building a team, never recruiting associates from any other KW Market Center without first discussing it with and receiving prior approval from BOTH Team Leaders and engaging in communication between BOTH rainmakers
37. In building an expansion business, never recruiting associates from any KW Market Center without discussing it with and receiving prior approval from BOTH Team Leaders (associate's primary location and expansion location)
38. Building your level one Profit Share Tree to 15 as soon as possible
39. Being excited to build your downline by asking others, "Will you promise me that you will take my Team Leader's call?"
40. Implementing the Keller Williams productivity systems such as the Growth Initiative, Cap Management, and the Career Growth Initiative (CGI)
41. Embracing new technology and Labs built by associates, for associates
42. Creating the budget you know you need for your business
43. Consistently lead generating for 3 hours per day
44. Using a monthly Profit and Loss Statement to analyze your real estate business
45. Hitting your monthly and annual production goals
46. Profitability in your personal real estate business
47. Listening – before you act
48. Earning – before you spend
49. Waiting – before you criticize
50. Trying – before you quit
51. Giving seven hugs a day
52. BE NICE! Kindness matters

KELLERWILLIAMS.

CULTURE


WIN-WIN
OR NO DEAL
WI4C2TES
OUR BELIEFS
INTEGRITY
DO THE RIGHT THING
CUSTOMERS
ALWAYS COME FIRST
COMMUNICATION
SEEK FIRST TO UNDERSTAND
COMMITMENT
IN ALL THINGS
CREATIVITY
IDEAS BEFORE RESULTS
TEAMWORK
TOGETHER EVERYONE ACHIEVES MORE
TRUST
STARTS WITH HONESTY
EQUITY
OPPORTUNITIES FOR ALL
SUCCESS
RESULTS THROUGH PEOPLE
kw
ALLENTOWN

OUR MVVBP

OUR MISSION

To build **CAREERS** worth having,
BUSINESSES worth owning,
LIVES worth living,
EXPERIENCES worth giving, and
LEGACIES worth leaving.

OUR VISION

To be the real estate
COMPANY OF CHOICE
for agents and their customers.

OUR VALUE

GOD, FAMILY, then business.

OUR BELIEF SYSTEM

WI4C2TS

WIN-WIN or no deal

INTEGRITY do the right thing

CUSTOMERS always come first

COMMITMENT in all things

COMMUNICATION seek first to understand

CREATIVITY ideas before results

TEAMWORK together everyone achieves more

TRUST starts with honesty

SUCCESS results through people

OUR PERSPECTIVE

A TECHNOLOGY COMPANY THAT PROVIDES THE REAL ESTATE PLATFORM THAT OUR AGENTS' BUYERS AND SELLERS PREFER.

Keller Williams thinks like a top producer, acts like a trainer-consultant, and focuses all its activities on service, productivity, and profitability.

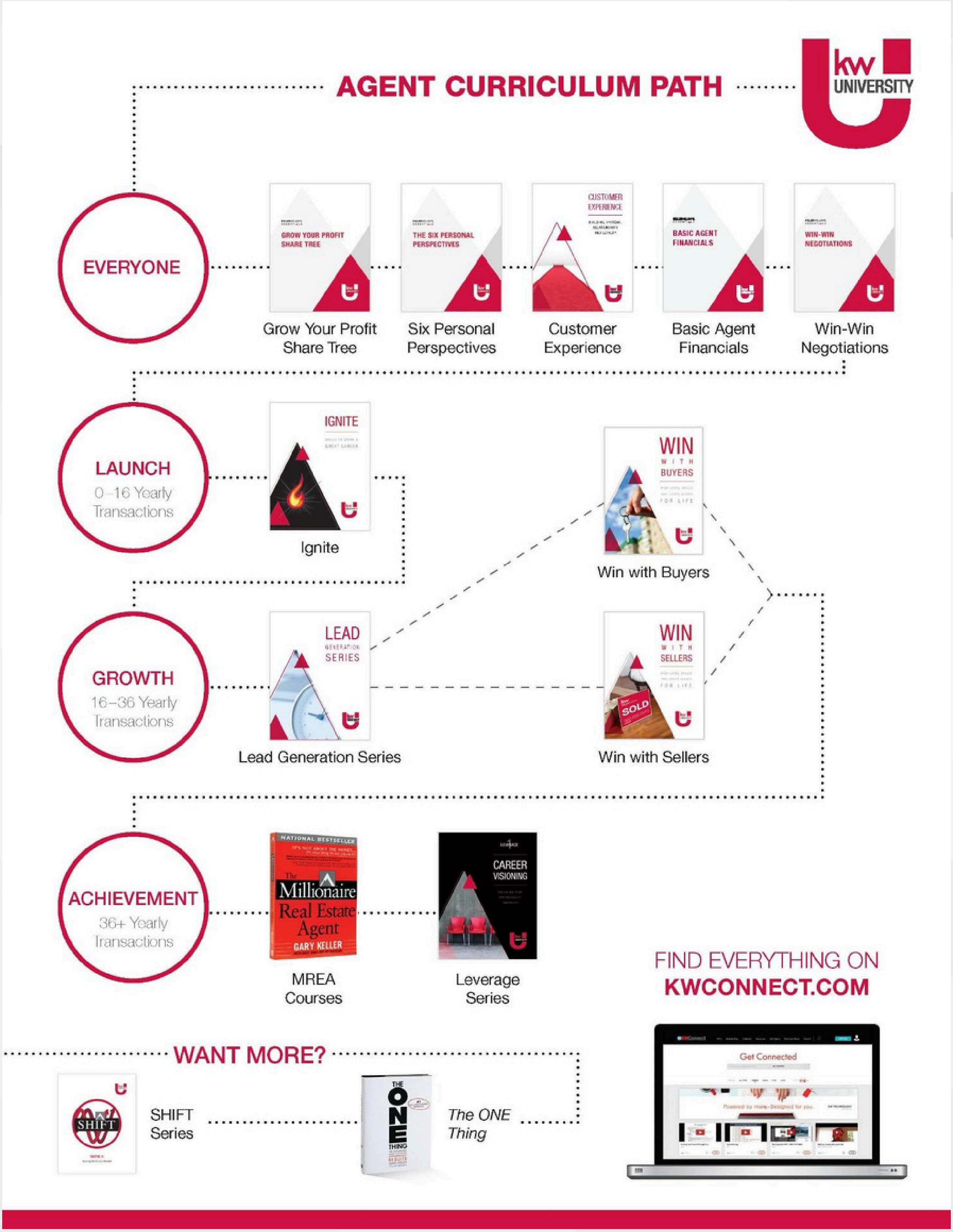
KW Cares is a 501(c)(3) public charity created to support Keller Williams associates and their families with hardship as a result of a sudden emergency. The charity is the heart of Keller Williams culture in action – finding and serving the higher purpose of business through charitable giving in the market centers and communities where Keller Williams associates live and work.

KW Shares is an internal charity created to assist Agents within our Market Center when they experience a hardship. Agents, Partners, and Vendors volunteer throughout the year to provide a “Lunch With A Heart” after the monthly Team Meeting. We ask that Agents joining us for the lunch donate at least $5.00 to KW Shares.

Renew. Energize. Donate. RED Day, which stands for Renew, Energize and Donate, is our annual day of service. Each year on the second Thursday of May, we celebrate RED Day as part of our legacy worth leaving. All Keller Williams Market Centers and offices worldwide close on that day to allow us to devote the day to our service project. Agents, Leadership, Partners, and friends of our Market Center serve at the Children’s Home of Easton.

KW Kids Can is an educational nonprofit founded to engage the next generation of entrepreneurs and world leaders in conversations that matter. Our learning program teaches young adults how to gain their edge in an increasingly competitive world. Students walk away with concrete tools that help them identify their purpose and achieve their goals.

EDUCATION


AGENT CURRICULUM PATH
kw UNIVERSITY
EVERYONE
Grow Your Profit Share Tree
Six Personal Perspectives
Customer Experience
Basic Agent Financials
Win-Win Negotiations
LAUNCH
0–16 Yearly Transactions
IGNITE
Ignite
GROWTH
16–36 Yearly Transactions
LEAD GENERATION SERIES
Lead Generation Series
WIN WITH BUYERS
Win with Buyers
WIN WITH SELLERS
Win with Sellers
ACHIEVEMENT
36+ Yearly Transactions
The Millionaire Real Estate Agent
GARY KELLER
MREA Courses
CAREER VISIONING
Leverage Series
WANT MORE?
SHIFT
SHIFT Series
THE ONE THING
The ONE Thing
FIND EVERYTHING ON
KWCONNECT.COM
Get Connected

EDUCATION

ONLINE TRAINING CALENDAR:

- Kwarocks
  - See events you can attend in person at the Market Center, Regional, and KWRI level
    - Export individual events to your Google Calendar or iCal

KW CONNECT LIVESTREAM TRAINING:

- KW Connect Live https://www.kwconnect.com/search?
- q=KWRIApproved-Conn ectLive&tfilter=ALL+CONTENT
  - Connect Live On Demand (pre-recorded, searchable, watch any time)

KATIE JO REMMEL, DIRECTOR OF TRANSITIONS & TECHNOLOGY

- KATIE JO REMMEL - YouTube
  - Subscribe to Channel to get notifications when new videos are posted

REGIONAL EVENTS:

- On Facebook: https://www.facebook.com/kwgparegion/?eid=ARB8qBzco8d 2Aj1a-dXp_vpO0rhGxqoZaiup1gXyrJkm10-StGyuZnEVW_vVn d3tpzUkmNKUJQTqflhd
  On Eventbrite.com: https://www.eventbrite.com/o/keller-
- williams-greater-pa-regio n-pa-southern-nj-de-4004241849
  - Training and events with top leaders, agents, teams, and speakers/instructors from across the country

TECHNOLOGY

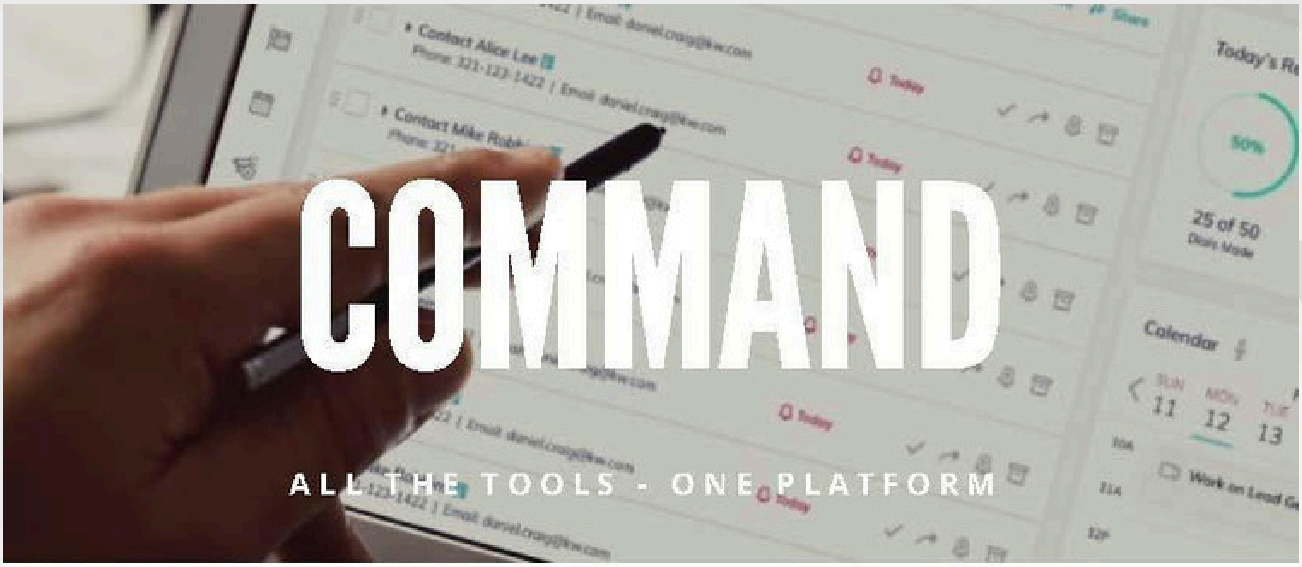
GET AN OVERVIEW AND EXPLORE
KW Connect

SEE WHAT'S BEING DEVELOPED
KW Connect

CONTRIBUTE & UPVOTE IDEAS
ideas.kw.com

GET SUPPORT & ANSWERS
answers.kw.com

TECHNOLOGY



CONTACTS
Manage your database and nurture your relationships, all in one place.

SMART PLANS
Automate your business to create digital leverage with curated, data-driven campaigns.

LOCAL INSIGHTS
Flex your hyper-local expertise. Share your local insights and see what others are saying.

REFERRALS
Grow your business with the world's largest independent agent-to-agent referral network.

LANDING PAGES
Create multi-channel marketing campgaigns across both digital and physical media.

LEAD ACCELERATOR
Create multi-channel marketing campaigns across both digital and physical media. Then, use the data to determine the success of a campaign and help you decide what to invest in next.

DESIGNS
Your design center to create engaging visual marketing pieces - simply and easily. Create your own designs from scratch, or personalize templates that have already been created. You choose!

LISTINGS
Own and manage your listings with ease.

LISTING CONSULT
Share your unique value proposition with a dynamic listing presentation designed for today's client.

SETTINGS
Customize your Keller Cloud experience here. Manage your Connected Applications with a simple click (we'll do the syncing for you!).

REFERRALS
Use Kelle to connect with other KW agents. Then, seamlessly send, track, and receive referrals. via Kelle.

OPPORTUNITIES
Streamline your transactions and take advantage of data-driven forecasting.

LEVERAGE
Simplify and systemize finding, tracking, and managing talent via the Career Visioning process.

CALENDAR
Keep track of your most precious resource - your time!

TECHNOLOGY

KW Consumer App

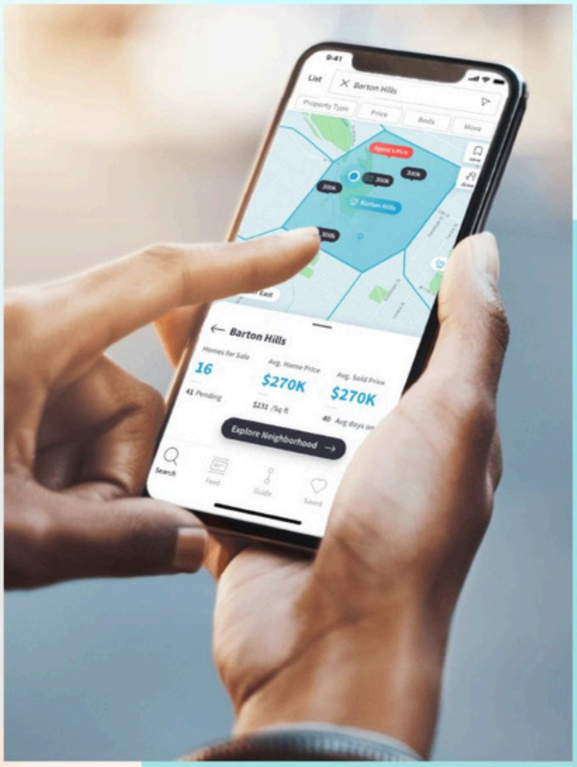
Connect quickly and directly with your clients with your personally branded KW Mobile Search App!

- Leads from your local MLS listings are sent directly to you. Enjoy quicker response time at your fingertips via call, text or email.
- Allows your clients to easily search for and share properties, save listings, view full-screen photos and more.

Easy instructions on how to download, brand, and share here:
KW Connect

KW Agent Website

Some agents prefer a “set it and forget it” website presence. Others want to create a personalized experience for their clients. The KW Website templates satisfy both types of agents!
Mobile is the future of the Web, especially for real estate. KW’s responsive websites adjust seamlessly to every screen size, providing your customers with an amazing user experience across their laptops, tablets, smartphones, and other devices.



Command Your Consumer Experience

Meet the first-of-its-kind, consumer-facing counterpart to Command. Go to your Consumer portal to launch your personalized app, collect valuable consumer insights, and lay the groundwork for relationships that last a lifetime.

- Guide, a fully-customizable client companion, facilitates the entire transaction from search to signing on the dotted line.
- Win consumer loyalty by refining their search with leading-edge functionality to find what they're looking for, faster.
- Give home buyers a deeper understanding of the neighborhoods that interest them including market and lifestyle information.
- Whether they're looking for their next home or their dream home, help clients organize, rank, and then discuss their favorite listings.

FINANCIALS

Whether you're new to the industry or already a top producer, the Career Growth Initiative (CGI) brings laser focus to the activities that lead to results. This suite of interconnected value tools provides you an
unprecedented view into your business so you know EXACTLY what needs to be accomplished in order to achieve all-new levels of production and profitability: the two factors that determine if your business can fund the life you envision for yourself and your family.

Learn more about the CGI and the tools available to you here: KW Connect

Talk to your Team Leaders or Market Center Administrator to learn more about what the Career Growth Initiative can do to help you crush your goals!

kw
ALLENTOWN

K W A F E E S + D U E S

FEES

KWA OFFICE TECH SUITE

Technology Package Fee......................... $100.00/Mo
E&O Fee Deductible.............................. $125.00/Qrt
KWRI National Renewal Fee................... $25.00/Yr
Supplies/ Copies.................................... Price Varies

GLVR

GLVR Dues... $110.00/Qrt

ANNUAL ASSOCIATION DUES- DUE JAN 1ST PAID TO GLVR (PRORATED FOR NEW APPLICATION)

NAR Dues.. $201.00/Yr
PAR Dues... $198.00/Yr
GLVR Dues... $125.00/Yr

ACTIVATION FEES DUE WHEN ACTIVATING (ONE TIME FEE PAID TO GLVR)

Member Association.................................. $250.00
Member MLS... $225.00
New PAR Member....................................... $100.00

QUESTIONS?

(610) 435-1800

1605 N Cedar Crest Blvd
Ste 309
Allentown, PA 18104

GLVR Dues

ACTIVATION FEES	AMOUNT
NEW ASSOCIATION MEMBER FEE	$250
NEW MEMBER MLS FEE	$225
PAR NEW MEMBER FEE	$100

QUARTERLY FEES	
MEMBER MLS FEES	$110

ANNUAL FEES	AMOUNT	DUE
NAR DUES		$201
PAR DUES		$198
GLVR DUES		$125

ASSOCIATION MEMBERSHIP & MLS PARTICIPATION

COMPLIANCE

Escrow/Earnest Money Deposit (EMD) Policy & Process:

Our office policy is that a **Cashier's Check** is required for all Escrow Deposits. We cannot accept personal checks, money orders, credit/debit card payments, or cash for escrow*. EARNNEST is an acceptable platform to electronically transfer funds".

Our Agents are required to include the following wording in every listing entered in the MLS in the Agent Remarks:

"ALL DEPOSITS MUST BE CASHIERS CHECKS UPON EXECUTED AGREEMENT OF SALE" or "CASHIER'S CHECK REQUIRED FOR ALL DEPOSITS" (use one of the phrases here exactly as it appears, please do not invent your own wording)

When a deposit check is received at the office for you or when you receive a deposit check directly from a Buyer Agent:

•If check is received at the office for you , the DOFI will make a copy of your check, and send a copy to you and the MCOM. The DOFI will also submit the check to the Commission Box for processing.

•Fill out an **Escrow Deposit Form** with all the required information. The document can be located in your opportunity, Kwarocks or printed forms are available in the copier room..

•Place the Escrow Deposit Form and check in one of the provided envelopes and drop in the MCOM Box in the copier room..

•Use the QR Code to log the information.

*****Remember to make a copy of the check and Escrow Deposit Form to load in to your opportunity for full compliance**

When a check is received here for your Buyer that is payable to an outside brokerage

• An email will be sent notifying you that you have a check in your mailbox

**Cashier's Checks are also required for commission paid to Keller Williams Real Estate on lease transactions and referrals. We cannot accept personal checks, money orders, wire transfers, credit/debit card payments, or cash for commissions.*

**If you are expecting an escrow checked through the postal service please notify the DOFI so they are aware.*

COMPLIANCE

Escrow Withdrawals Policy & Process :

Requesting an Escrow Withdrawal for an upcoming Settlement:
•Fill out an **Escrow Withdrawal** with all the required information. The document can be located in your opportunity, Kwarocks or printed forms are available in the copier room.
•Place the **Escrow Withdrawal Form** in one of the provided envelopes and drop in the MCOM box in the copier room.
•Or use the QR Code on the MCOM box to log the information.
•Once the check has been processed an email will be sent from the Director of First Impression notifying you that you have an escrow check in your mailbox.
If you are unable to make it into the office to turn in the form, please email the completed Escrow Withdrawal Form as a PDF attachment to the MCOM.

Requesting an Escrow Release for a transaction that is terminating:
•Fill out an **Escrow Withdrawal Form** with all the required information. (The document can be located in your opportunity, Kwarocks or printed forms are available in the copier room.
•You must include a fully executed **Termination/Release (PAR TERAREL)** with the **Escrow Withdrawal Form** submission.
•Place the **Escrow Withdrawal Form** and the **TERAREL** in one of the provided envelopes and drop in the MCOM box in the copier room.
•Or use the QR Code on the MCOM box to log the information..
•Once the check has been processed the Director of First Impression will email you to notify you that you have a check in your mailbox.
•Remember to make a copy of **TERAREL** and **Escrow Withdrawal Form** to load in to your opportunity for full compliance
•All release requests must be reviewed and approved by the Broker before escrow funds can be released.
If you are unable to make it in to the office to turn in the form, please email the completed Escrow Withdrawal Form as a PDF attachment to the MCOM.

Please allow a minimum of 5 business days for processing of withdrawal requests.

Required Documents for Transactions:
Documenting your transactions properly and thoroughly limits liability and protects the brokerage, you, and most importantly, your client. To facilitate this, the Broker of Record and Compliance Coordinator(s) maintain checklists of documents needed for the various types of transactions. These checklists include documents required by the state, in-house forms required by our KPG ownership and Broker Advisor, and conditionally required forms based on the circumstances of individual transactions. The current checklists can be found in the your respective opportunity with in Command.

Before Placing in Commission Box

WHAT DO I NEED TO TURN IN?

ESCROW DEPOSIT

- Escrow Deposit Form
  - All appropriate information filled out names, address, amount of deposit, closing date, listing agent name, etc.
- Cashiers Check
- Executed AOS, Escrow Form & Copy of Check must be in your opportunity.

ESCROW WITHDRAWAL

- Escrow Withdrawal Form
  - Please request at least 5 BUSINESS days prior to Closing
  - All appropriate information filled out- names, address, amount of deposit, closing date, listing agent name, title company, E-check info, etc..
- Withdrawal form must be in your opportunity.

TERMINATION RELEASE

- Escrow Withdrawal Form
- Executed Notice of Termination of Agreement of Sale (TERAREL)
- Withdrawal Form and Termination/Release must be in your opportunity.

LEASE

- Cashier/Commission check
- Lease Agreement pages 1 & 2
- If you are the listing agent and the Market Center needs to pay the tenant agent, you MUST include a W-9 FORM for their brokerage.
- Lease and Copy of Check must be in your opportunity.

SETTLEMENT

- Commission Check
- Settlement Statement (HUD, ALTA)
- If there is an outside referral that the Market Center needs to pay, you must include a copy of the REFERRAL AGREEMENT AND W-9 FORM for the brokerage where the check is to be sent and they must be loaded into your opportunity.

WEALTH BUILDING

PROFIT SHARE:

Profit share is one way in which Keller Williams Realty exemplifies the principle of success through others. Each month, market centers share roughly half of their profits with the agents who helped grow the market center and make it profitable.

Fortify your business and your life with the passive income opportunity of Profit Share. It's win-win. And that's who we are. Because we truly believe that together everyone achieves more—and we are willing to put that belief into action—at Keller Williams any associate who helps to grow a profitable Market Center can be rewarded with *passive*, *potentially long-term income*, without any risks or investing any capital.

Profit Share is a very real means of growing wealth for you and your family. It has helped numerous families in our system fund the lives they had hoped for. It can help you and yours too

RESOURCES FOR WEALTH BUILDING THROUGH PROFIT SHARE:

- How Profit Share Works
- Grow Your Profit Share Tree
- Wealth Building White Paper

- KW Connect - Resources - Profit Share

WEALTH BUILDING

The easiest way to start building your Profit Share is to refer great agents to your Team Leaders. You can use this form to get the agent's contact information to the Team Leaders so they can start the conversation! (Blank form can be found in Dotloop Templates)

Focus on 15

KW AGENT NAME

MONTH

YEAR

ALC MEMBER

☐ yes ☐ no

WEEK OF THE MONTH

☐ 1 ☐ 2 ☐ 3 ☐ 4

SCRIPT

"I love doing transactions with you. You are awesome! I told my Team Leader just the other day how great you are. He/she will be calling you to thank you for the way you do business. Will you promise me you will take his/her call?"

☐ **Yes, this fabulous agent has promised to take your call to say "thank you."**

REFERRED AGENT'S NAME

PHONE NUMBERS

CURRENT COMPANY

HOW DO YOU KNOW THIS AGENT?

- ☐ closed a deal together
- ☐ wrote a deal on their listing, fell through
- ☐ wrote a deal on my listing, fell through
- ☐ listing agent for a great property
- ☐ agent showed my listing
- ☐ met at a class/learning based
- ☐ other:

IS THERE ANYTHING ELSE YOU'D LIKE TO TELL ME ABOUT THIS AGENT?

TEAM LEADER, WHAT WAS THE RESULT OF THIS CONVERSATION?

☐ appointment date ☐ invited to training ☐ added to our database ☐ other:

THANK YOU FOR ALLOWING ME THE OPPORTUNITY TO HELP GROW YOUR PROFIT SHARE TREE!

DATE RETURNED TO AGENT

WEALTH BUILDING

As you build your real estate business, there are opportunities for you to create multiple passive income streams from a variety of sources. The MREA model is built around passive income, and at the Keller Williams Market Centers that are part of KPG, the goal is to provide some of those opportunities for their agents. This is
based in our Culture of teamwork and fostering relationships that are a WIN-WIN for all parties.

If you are interested in creating multiple passive income streams to fund a multitude of passions, wishes, and dreams, speak with the Team Leaders who will introduce you to the Core Services Director. This team will map out the specifics on how you can start to build your own passive income streams to fund your best life.

For more information, ask your Team Leader to put you in contact with Bill O'Connell – Title Alliance, Ltd. Core Services Director

RESOURCES

TECHNICAL SUPPORT

Reppert Factor IT Support: https://portal.reppertfactor.com or 215-945-8869 ext. 3 to open a Help Ticket for IT support

KW Support: KW Answers or 512-306-7191

DocuSign Support: DocuSign Support or 800-379-9973

SIGNS & SUPPLIES
The Market Center has a stock of yard signs and riders available using the Supply Order Form, which is located at https://www.kwarocks.com. For custom name riders, we recommend Express Sign Outlet in Allentown Express Sign Outlet | Our stock yard signs can accommodate up to two
28” x 6” riders.

MARKETING MATERIALS
Please visit our KW Lehigh Valley Marketing website https://www.kwlvmarketing.com/ where you can order a variety of marketing materials. Our Director of Marketing will design your items at no charge, you just pay for materials and postage as applicable. You can order postcards, flyers, brochures, presentations, business cards, and more! Also available is a full set of approved Keller Williams and other essential logos to download for use in various applications.
If you prefer to design your own pieces, you can use the Designs/Sketch House application within Command.

Additional business card and print marketing vendor we recommend:
Best Print Buy BestPrintBuy or https://www.vistaprint.com

For KW branded apparel and promotional items https://kwredstore.com

RESOURCES

COMMONLY USED TERMS AND ACRONYMS

4-1-1: A productivity tool that drives your goal setting from the desired end results to the present. 4-1-1 stands for four weeks, one month, and one year; but you must first set the yearly goals and then detail monthly and weekly goals.

8 x 8: A lead generation schedule consisting of eight touches over eight weeks. A high-impact, high-saturation technique that is designed to put you top of mind for your potential buyers and sellers.

Aha's: A self discovery of a moment, statement or action you find inspiring, worth remembering or motivational.

ALC-Associate Leadership Council: A group of individuals drawn from the top 20 percent of Market Center producers.

Allied Resources: These are individuals you have met that you expect either to do business with or to receive leads from every year.

Associate: An agent who joins Keller Williams Realty is referred to an associate because they are treated like a stakeholder in an interdependent business model.

Big Rocks: If you are given a glass, different materials, large rocks, small rocks, pebbles, sand, water; fit into the glass in different ways. By putting water first, then sand, then pebbles, then small rocks, then big rocks, you would fit less material. But if you put the big rocks in first, etc., you can fit more materials into your glass.

Big Why: The biggest motivational factor in your life that pushes you daily to excel and be your best both personally and professionally.

Capper: An individual who produces sufficient GCI and contributes enough Company Dollar to the Market Center to satisfy his/her annual commission Cap requirement. After capping, the individual keeps all commission income.

Company Dollar: The money the Market Center keeps after all the agents are paid their commissions. The Market Center uses these funds to pay bills and to make a profit.

DISC: A written personality profiling system that assesses Aggression/Response to Challenge, Influence/Persuasion, Activities/Responsibilities, and Rule/Regulation.

RESOURCES

COMMONLY USED TERMS AND ACRONYMS

GCI-Gross Commission Income: The total amount of commission dollars the Market Center receives from a transaction.

KPA-Keller Personality Assessment: A tool that give insight into how one's personality traits match with the different roles within the Keller Williams organization, from administrative assistant to Agent to Team Leader and beyond. Like the DISC, the KPA can be used for hiring, recruiting, personal insight, and business development.

MC-Market Center: Term used instead of "Office."

MCCOM: The MCOM is responsible for implementing and maintaining all operating systems in a KW Market Center.

MREA or the Red Book: Millionaire Real Estate Agent book written by Gary Keller and Jay Papasan.

MVVBP: Mission, Vision, Value, Beliefs, Perspectives. At Keller Williams Realty, we believe that every business needs to have a Mission, Vision, Value, Beliefs and Perspectives written down so each agent can see what their goals are.

OP-Operating Principal: The Operating Principal is responsible for the success of the business venture. They are also responsible for bringing Capital, Leadership, and Accountability.

Profit Share: Amount of Market Center profit that is sent to KWRI for distribution to the appropriate Associate in the Profit Share Tree.

RD-Regional Director: The Regional Representative who administers KW in a geographical area. RD's award franchises to prospective owners and see that the KW Model is followed in their Region.

TL-Team Leader: The person at a Market Center who is responsible for recruiting/selecting sales associates. The TL also trains and consults with the top 20% of MC associates to greater performance.

The Model: The process set forth by Keller Williams Realty International that describes the guidelines to be followed for the successful launch and profitable operation of a Market Center.

Transmittal: The monthly process through which the Market Center closes their books and sends their information to KWRI. Transmittals are due by the 3rd business day of the following month. Successful transmittal is a critical task for the Market Center leadership team.

WI4C2TES: Our belief system and driver of the Keller Williams culture.

WE ARE SO EXCITED TO HAVE YOU BE APART OF KWA

Follow us on our social medias!

@kwallentown_

Keller Williams Real Estate - Allentown