



Welcome to Relative Investments Referral Company.

Relative Investments is a simple approach that allows agents not participating in active real estate to make money and help their friends, family members, and acquaintances by referring them to their agent of choice.

If you need help finding the perfect agent, our team will be happy to make some recommendations depending upon the client's needs.

There is some basic information that we need from you in order to complete the sign up process.

1. A copy of your current real estate license
2. A completed W9 (PDF attached for your convenience)
3. Contact Form
4. \$100 Administrative Compliance Fee. You can pay this via Paypal ([click here](#)) or by check payable to Relative Investments. Mailing address: 229 Gleneagles Dr., Atlantis, FL 33462

Please return this as quickly as possible so that we can get you active in our system – and with the tate!

The good news is that you no longer have to pay board dues or MLS fees.

You are active as an agent with the state of Florida as a referral agent!

Here's how you make money:

- Simply send a referral agreement to the other agent (who will be assisting your client)**
- Sit back and wait for the transaction to close!
- You will get paid on a 70/30 split for the fee that you negotiated with the referral agent. (You can choose to have a check mailed to you or receive payment via Paypal)

I hope this addresses any questions you may have.

If not, please feel free to give me a call. We can go over anything in more detail.

Welcome Aboard!

Linda Shea

**** IMPORTANT:** We are unable to assist in getting your referral fee without a signed referral agreement between you and the other agent.



Profile Form

Please complete and return via email to support@relativereferrals.com

Full Name (as it appears on your license): _____

Address: _____

City: _____ State: _____ Zip: _____

Email Address: _____

Phone: _____

FL Real Estate License #: _____ Expiration: _____

Referral Associate Signature

Date: _____

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

Print or type See Specific Instructions on page 2.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification; check only one of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input type="checkbox"/> Other (see instructions) ▶ _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	6 City, state, and ZIP code	
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number										
				-				-		
or										
Employer identification number										
				-						

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.

By signing the filled-out form, you:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

DBPR RE-2050 – Request for Change of Status

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
1940 North Monroe Street
Tallahassee, FL 32399-0783
Customer Contact Center: 850.487.1395
FAX: 850.488.8040
www.myfloridalicense.com/dbpr

CHECK ACTION(S) REQUESTED
Transaction Type: <input type="checkbox"/> Become Active – no charge <input type="checkbox"/> Become Inactive – no charge <input type="checkbox"/> Add/Delete Trade Name – no charge <input type="checkbox"/> Become Sole Proprietor – no charge (Forms 2050 & 0080 required) <input type="checkbox"/> Change Broker/Owner Employer – no charge <input type="checkbox"/> Terminate Employee – no charge <input type="checkbox"/> Add/Delete PA or LLC - \$30.00 fee required – see F.S. 475.161 <input type="checkbox"/> Request for Multiple License - \$95.00 <input type="checkbox"/> Renew license <input type="checkbox"/> Qualifying Broker (CQ package required) <input type="checkbox"/> Owner/Developer (Forms 2050 & 0080 required)

ASSOCIATE INFORMATION	
License Number	Licensee Name
Contact Information (telephone number or E-Mail address)	

BROKER OR ORGANIZATION INFORMATION	
Broker License Number	Organization License Number
Broker/Owner Name	
Organization Name	
Trade Name (if applicable)	Contact Info. (telephone number or E-Mail address)
Are you now or with the issuance of this license, an officer, director, member, or partner of any corporation, partnership, or L.L.C. which acts as a broker? Yes <input type="checkbox"/> No <input type="checkbox"/>	
If yes, please list name of entity	

ATTEST STATEMENT	
REQUIRES SIGNATURE OF BROKER AND ASSOCIATE*	
(Except for Add/Delete PA or LLC – which may be signed by the licensee)	
I affirm that I have provided the above information completely and truthfully to the best of my knowledge.	
Broker/Owner Sign Here: _____	Date: _____
*Broker signature not req. for Assoc. inactive status or add/delete PA –LLC	
Print Broker/Owner Name: _____	
Associate Sign Here: _____	Date: _____
*All Associate requested changes require signature	



REFERRAL INFORMATION FORM

Section 1:

RECEIVING OFFICE	SENDING OFFICE
Federal Tax ID #:	Federal Tax ID #:
TO: Agent:	FROM: Agent:
Firm Name:	Firm Name:
Address:	Address:
City/State/Zip:	City/State/Zip:
Business Phone:	Business Phone:
Home Phone:	Home Phone:

Section 2: Seller Information

Seller Name:	When to make initial contact:
Address:	Property address to be listed:
City/State/Zip	
Business Phone	
Home Phone	Additional Helpful Information

Section 3: Buyer Information

Buyer's Name	New Employer:
Address:	Address:
City/State/Zip:	City/State/Zip:
Business Phone:	Position & Approximate Salary:
Home Phone:	Must home be sold first?
Preferred Location:	Company buyout?
Size & Type of Home Desired:	Contact Buyer at this number first: By the date:
Price Range; \$ _____	Cash available for Purchase & Closing Costs:
Number in Family:	Expected Arrival Date: Moving Date:
Adults:	Comments:
Children (with ages):	

Section 4: Realtor's Acceptance of Referral

Prospect's Name	Comment
Date Contacted:	
Date of First Appointment:	
<p style="text-align: center;">WE ACCEPT THIS REFERRAL, AND WHEN THE SALE IS CONSUMMATED, WE AGREE TO SEND _____ % (OF THE GROSS COMMISSION) AS A REFERRAL FEE. WE WILL ENCLOSE DETAILS OF TE SALE WITH THE CHECK.</p>	

Receiving Sales Associate Signature: Date: / /	Receiving Broker's Signature: Date: / /
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*****IMPORTANT*****

READ THIS CAREFULLY IN ORDER TO GET PAID FOR YOUR REFERRALS.

It is important to follow these procedures in order to be paid your referral fee.

If you do not follow these instructions, you may not be eligible for a referral fee – and we will not be able to intervene with the referral agent to assist you.

1. Contact the chosen agent to see if he or she can provide the service in which you are interested. If you do not know an agent in that area, we can certainly reach out in seeking assistance in selecting a receiving agent. Be sure that the agent is completely familiar with the area the customer has indicated or where you have a potential listing.

NOTE: If you need assistance in locating a referral agent, we are happy to help you locate several agents to interview and/or you may choose to work with an agent that we have a business relationship with (specific to South Florida).

2. Confirm the referral fee. Referral fees are negotiable.

If you're not sure where to start, then shoot for 30-35%. Often, the referral fee will settle somewhere around 25-30%. But certainly negotiate the highest fee you can!

Remember, referral fees are a percentage of the gross commission.

3. Fill in the "Sending Office" section of the Referral Information Form. You may wish to include a buyer or seller name, but **DO NOT PROVIDE ANY CONTACT INFORMATION UNTIL YOU RECEIVE A SIGNED REFERRAL FORM BACK.**
4. Once the Receiving Sales Associate and Receiving Broker accepted the referral (Section #4), provide your client's contact information to the agent.

If you provide contact information/details in Section 2 (Seller Information) or Section 3 (Buyer Information) PRIOR to getting a signature, you may not get paid.



COMPLETING THE REFERRAL INFORMATION FORM

1. **SECTION 1: RECEIVING OFFICE/SENDING OFFICE:** This identifies the receiving/sending agents. The left side will be filled out by the receiving office. The right side is to be filled out by the Relative Investments Referral Agent.
2. **SECTION 2: SELLER INFORMATION:** This is used when sending out a listing referral. This portion should be completed by the sending agent after the referral agreement has been accepted by the receiving sales associate and broker.
3. **SECTION 3: BUYER INFORMATION:** This is used when sending out a buyer referral. This portion should be completed by the sending agent after the referral agreement has been accepted by the receiving sales associate and broker.
4. **SECTION 4: REALTOR'S ACCEPTANCE OF REFERRAL:** This should be completed by the receiving agent and returned to the sending agent prior to providing any information to the other agent/broker.

10 Ways to Increase Referral Business

(without doing any extra work!)

People are always buying and selling and with your experience as an agent, you can get a piece of the pie. As a referral agent, you can help them find the right person to represent them and get paid for making the connection. It doesn't cost your friend, family member or contact a nickel!

Want to kick it up a notch? Offer them some sort of item of value that will help them with either buying or selling their house. For instance, you can offer to take a look at the closing statement, to provide them with some referrals for various services or even a gift card to their favorite restaurant or store to celebrate their closing...



Friends, Family & Acquaintances

As a referral agent, you can help people buy or sell even if they live in another state. Reach out to people on social media and let them know you can help them with their real estate needs throughout the country. Come up with something unique that you can offer them such as reviewing a closing statement, sharing their property on social media for extra exposure, helpful resources, etc.



Past Clients

Your past clients can be an excellent source of referrals in the future.

Keep in touch just like you would as an active agent and let them know you can still help them with their ongoing real estate needs.



Earn Thousands on Your Own Transactions

You can negotiate any referral you want, so simply have a Realtor friend represent you and negotiate a higher referral percentage for yourself. You can negotiate 60%, 70% or more on your own deals.

This is great for investors or agents that buy or sell their own properties every couple of years.



The People That You'll Meet

Statistically, you'll run into 5 people over the next year who are thinking about moving, even more if you work for a large company. Coworkers and business acquaintances can be a huge source of referral leads. Whether the person is relocating, received a promotion and wants to upgrade to a bigger house, or has a change in family dynamics, there are loads of opportunities.



Social Media

Chances are that people around you know that you've been in real estate, so why not mention it on social media. Share some useful articles or stories and remind people that you're still connected and can help them. You don't need to plaster your social media account, but periodically mention it in your posts and how you can help people anywhere around the country find the right agent.



Spread the Word

Whenever you're out and about, let people know that you are a referral agent and that you are able to help them find the perfect Realtor for their needs. You can find buyers and sellers everywhere! on vacation, in line at the grocery store, running errands, dining out, virtually everywhere you go, you have an opportunity to meet someone that may be looking to buy or sell a home in the next few months.



Professional Contacts

Make sure your doctor, dentist, vet, attorney, and so on knows that you are still involved in real estate. Consider putting together a "directory" that you can include them in and share with your referrals. By offering these professionals another opportunity for exposure, they will keep you top of mind. Ask them if you can put your business cards out front for clients to pick up.



Advertising

There are lots of simple, inexpensive ways to "advertise" from social media, web advertising, local media, postcards, newsletters.



Corporate Relocation

There are lots of companies and organizations that don't have "official" relocations services to offer their employees. Consider contacting the HR departments for companies to offer your services.

Think of a way to make it a win for the company, and you'll be a referral machine before you know it!



Organizations, Associations & Groups

There are lots of groups that need content in their newsletters, on their blogs, and so on. Likewise, there are always opportunities for educational speakers to various groups. If either of these appeals to you, then this is another great source of leads. Groups to consider include buying/selling seminars at your local library, charity groups, alumni associations, sports teams, churches or places of worship, men's/women's clubs, HOAs, PTAs, etc.