



## Agent Transfer Checklist

### What you need to know BEFORE you make your move

**Use this checklist to help prepare for your move.** When transferring from one brokerage or office to another, the process begins with your Association. NNRMLS will be notified of your move only after your Association has transferred you from one place to another. Our goal is to ensure as smooth a transfer as possible.

**KEY:** Broker A = brokerage you are moving FROM; Broker B = brokerage you are moving TO.

#### Listings – If you currently have Active or Pending Listings in your Name

- If you are transferring to a ***different firm***:
  - The Broker owns the listings. Discuss with Broker A whether or not you will be taking your listings with you to your new office.
    - Broker A has 30 days from your termination to either allow the Active and Pending listings currently under your name to be withdrawn and re-listed by you under Broker B or transfer to them into the name of another agent with Broker A.
    - All listings that Broker A will release to you must be withdrawn by Broker A and re-listed by you with Broker B. Sellers signatures are required to withdraw from Broker A and all new paperwork with new signatures is required through Broker B in order to re-list these properties.
  
- If you are transferring to a ***different branch office of the same firm***:
  - Upon notification of your transfer and receipt of documentation from Broker A, NNRMLS will transfer your active listings from Branch A to Branch B of the same Firm.
  - A **Listing Transfer Form** must be completed (for each listing) with Broker A's signature. The Listing Transfer Form can be found in the *Other Forms* folder of *MLS Documents* in Paragon.
  - Email forms to [info@nnrmls.com](mailto:info@nnrmls.com) or fax to (775) 823-8809.
  - NNRMLS cannot transfer listings marked with withdrawn, sold, or expired status.

#### Paragon – Auto e-mail notifications, contacts, searches, and CMA presentations

- If you are transferring to a ***different firm or to a different branch within the same firm***:
  - Your contacts, auto-emails, CMA presentations and saved searches will not be affected by the transfer process.
  - The contents of your Email Signature and your Standard Message Body will transfer, but **will not automatically update** to your new brokerage. Update your "Default" email signature to reflect any new contact information or branding. You can do this at any time before or after the transfer. Contact [support@nnrmls.com](mailto:support@nnrmls.com) for help updating your email signature.
  
- If you are transferring to an ***office that belongs to a different REALTOR Association***:
  - *Your member number may change and* your contacts, auto-emails, CMA presentations and saved searches **will not transfer to your new brokerage**.
  - *Your member number may change and* your **Paragon listing/sold history will be lost**. (This information follows your Member Number – not your name)

- Paragon - After you have transferred to the new firm**
  - Run Paragon's Preferences and Collab Center Wizards to ensure your Paragon account is personalized to you. To run the Preferences Wizard, click the Preferences icon in Paragon, then click on the Preferences Wizard under the "System" heading. Click the Start button to begin advancing through the 13 slides that allow you to customize and brand Paragon. For instructional video [click here](#) – for quick start guide [click here](#)

#### **Instanet – Transactions**

*Instanet might take up to 24 hours to add your NEW brokerage information. If you create a transaction during this time you will be creating it under your FORMER brokerage and will lose it once the system transitions to your NEW brokerage; this is because all transaction created under the FORMER brokerage are transferred to the FORMER brokerage when your transfer is complete. To make sure you create transaction under your NEW brokerage verify that none of your old transaction appear in your instanet account.*

- If you are transferring to a **different firm**:
  - Transaction records stay with the Broker and will not be accessible to you at your new firm.
  - Start a good habit now of creating an Archive Copy as your transactions close. This will make a PDF copy of your transaction so that you can either save it to your own external drive or and save it in DocBox. The archive in DocBox will be available to you even after you transfer to Brokerage B. Instanet will retain the archive copy up to the 5 years (NV requirement) as long as you are a customer of Instanet.
  
- If you are transferring to a **different branch office of the same firm**:
  - With prior written authorization from Broker A, NNRMLS staff can transfer your transactions from Branch A to Branch B within the same firm.

#### **Accounting – NNRMLS Monthly Fees**

- Your NNRMLS account must be Current
  - If your membership has been suspended for non-payment you must bring your NNRMLS account current including applicable re-activation fees before the transfer is completed.
  - **NOTE to Broker A:** If the suspended agent's fees have been overdue for 55 days they are considered non-members for MLS purposes and future billings become the responsibility of the Participant. NNRMLS will not collect fees from the transferring agent to apply to the Broker's bill. It is the Broker's responsibility to obtain reimbursement from the agent.
- If you use Auto Payment through NNRMLS, please email [amiev@nnrmls.com](mailto:amiev@nnrmls.com) to check the status of your Auto Payment.

#### **Agent Websites – IDX Contracts reside with the Broker**

- Register your website through NNRMLS, Broker, and Vender
  - If you have a website displaying MLS listings (IDX), your website information must be transferred to the new brokerage; updated branding and contact info as well as new contract through your new broker.
    - Contact your IDX Website vendor directly to begin the process
    - Notify NNRMLS IDX so that your website is removed from Broker A's IDX/Broker Reciprocity contract/bill and a new contract with your new broker is executed.
- Contact [idx@nnrmls.com](mailto:idx@nnrmls.com) for information regarding your website.