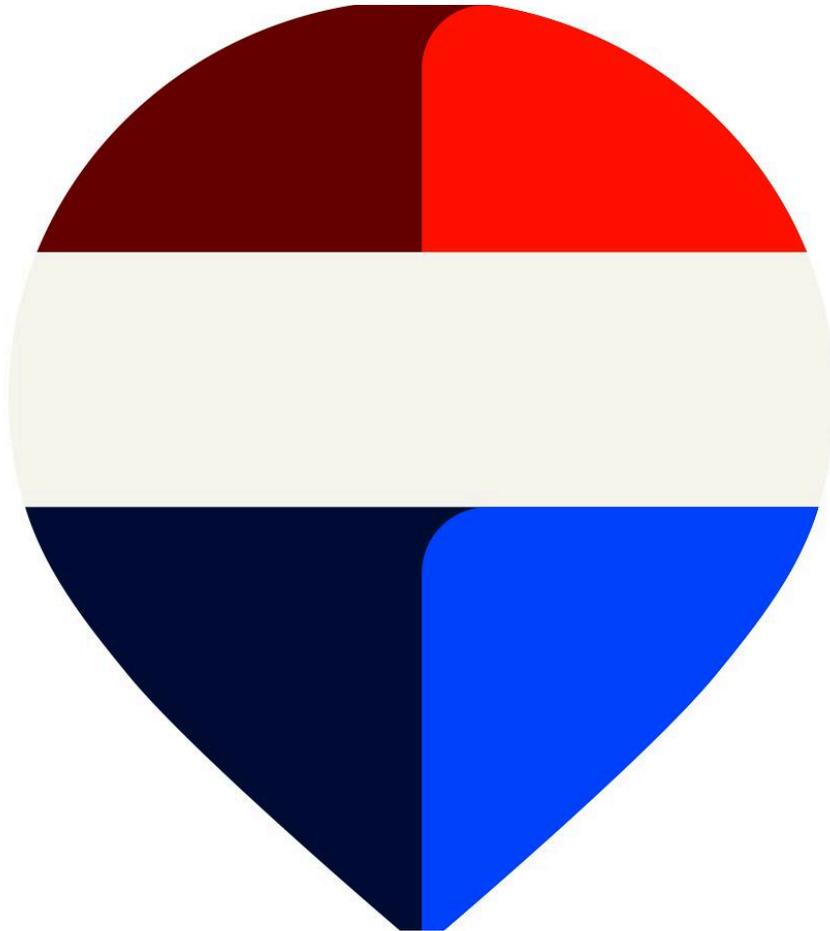


Welcome to RE/MAX Town & Country



A Complete Guide to
RE/MAX Town & Country



Unstoppable Starts Here



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584 Route 9 Fishkill, NY 12524 ~ 845-765-6128
12 Main Street, Warwick, NY 10990 ~ 845-986-4592
103 Mill Plain Road, Danbury, CT 06811 ~ 203-826-9399

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Our Team

Meet the Team!

The leadership team at RE/MAX Town & Country brings a blend of strategic vision, deep industry expertise, and a commitment to elevating every agent's business. They foster a culture of support, innovation, and accountability.



Who Do I Call?

Product	Team Member	Phone Number	Office
Advertising Compliance	Diane Butterman	(914) 879-0253	
BoldTrail	Diane Butterman	(914) 879-0253	
Buyer Questions	Howard Payson	(203) 240-7233	
CMN	Ray Rivera	(347) 698-9391	
Commission Check Deposit	Ray Rivera	(347) 698-9391	
Commission Check Direct Deposit	Ray Rivera	(347) 698-9391	
Commission Questions	Ray Rivera	(347) 698-9391	
Contact List	Diane Butterman	(914) 879-0253	
Copier/Printer	Jennifer La Torre	(973) 530-8300	Warwick
Darwin Cloud	Ray Rivera	(347) 698-9391	
Deal Questions	Howard Payson	(203) 240-7233	
DOS/DCP Affiliation	Diane Butterman	(914) 879-0253	
Dotloop	Diane Butterman	(914) 879-0253	
Form Questions	Diane Butterman	(914) 879-0253	
Lead Assistance	Diane Butterman	(914) 879-0253	
Lead Certification	Diane Butterman	(914) 879-0253	
Legal	Howard Payson	(203) 240-7233	
MLS - Cancellation/Withdraw Listings	Diane Butterman	(914) 879-0253	
MLS - Mark Listings Sold	Diane Butterman	(914) 879-0253	
Monthly Invoice Payments	Ray Rivera	(347) 698-9391	
Monthly Invoices	Ray Rivera	(347) 698-9391	
Office Policies	Diane Butterman	(914) 879-0253	
Office Systems	Diane Butterman	(914) 879-0253	
Opcity	Ray Rivera	(347) 698-9391	
Photofy	Diane Butterman	(914) 879-0253	
RE/MAX Hustle	Diana Butterman	(914) 879-0253	
Seller Questions	Howard Payson	(203) 240-7233	
Social Media/Profile Assistance	Jennifer La Torre	(973) 530-8300	
Supplies	Ray Rivera	(347) 698-9391	
Tech Connections/Setups	Diane Butterman	(914) 879-0253	Fishkill/Danbury
	Jennifer La Torre		Warwick
Training Calendar	Diane Butterman	(914) 879-0253	
Transaction Assistance	Diane Butterman	(914) 879-0253	

New to RE/MAX

What do I do first?

- You will receive an email from RE/MAX Northeast Region (northeastregion.remax.com@bbsv4.net) welcoming you to RE/MAX. Follow the link to activate your email address. Any email sent to your remax.net email address will be forwarded to the email you designate in your RE/MAX profile. Usually this will be the “RE/MAX gmail” address you created or your team email.
- Login to remax.net and select Learning & Education on the dashboard. Select Step 1: Onboard to RE/MAX from the Quick Links menu on your dashboard. These Agent Technology training videos will provide you with the tech tools, tops, and best practices for being the most productive and profitable agent as quickly as possible.
- All customizing of RE/MAX back office will be completed at orientation. These videos will give you a head start.

Here's a comprehensive [checklist](#) to help you stay organized and ensure you don't miss any crucial steps in your journey! For a copy of the checklist see Addendum C

Or scan the QR code:



Advertising under DCP Guidelines

The real estate statutes now include a new definition of “advertising” that includes print media, audio or video broadcast, and written or photographic material distributed through various mediums. The laws have been modified to distinguish between supervising licensees (e.g., brokers) and supervised licensees (e.g., team members, associate brokers, and salespeople).

General Advertising Requirements

- All real estate advertising must be clear and conspicuous.
- Advertising cannot imply that any group is a licensed business entity unless properly licensed as one.
- A group cannot imply it is a team unless properly registered as one.
- A team cannot imply it is a business entity.

Sign Requirements

- Signs must be kept in good condition and safe.
- Signs must not obstruct traffic signs, signals, or devices.
- Signs must not obstruct architectural features like windows, doors, or cornices.
- Unless permitted by law, signs must not be attached to utility poles, trees, or fences.
- Signs must be located within the boundaries of the lot.
- Unless permitted by the city, signs must not be in the right-of-way or on public property.
- Signs must be erected to allow free ingress and egress from doors, windows, and other exit ways.
- Signs must include the name and/or brand of the real estate broker.

Print Media Advertising (Supervising Licensees/Brokers)

- Must prominently display name as it appears on license.
- Must prominently display phone number or email address.
- If the advertisement is on behalf of or in coordination with another supervising licensee, the names and phone numbers of all responsible supervising licensees must be included.

Print Media Advertising (Supervised Licensees/Associate Brokers and Salespeople)

- Must include name as it appears on license.
- Must include phone number or email address.
- Must include the name of the supervising licensee.
- Must include the supervising licensee’s phone number or email address.
- The supervising licensee’s information must be in the same font size or larger than the supervised licensee’s information.
- Associate brokers must also follow the requirements and standards of real estate brokers.

Electronic Media Advertising (Supervising Licensees/Brokers)

- Must include name as it appears on license (prominently displayed).

- Must include a link to an internet site that complies with the requirements for internet sites if publishing or posting to electronic media such as social media, computer/mobile phone applications, text messages, or email.

Electronic Media Advertising (Supervised Licensees/Associate Brokers and Salespeople)

- Must include name as it appears on license (prominently displayed).
- Must include a link to an internet site that complies with the requirements for internet sites if publishing or posting to electronic media such as social media, computer/mobile phone applications, text messages, or email.

Internet Site Advertising (Supervising Licensees/Brokers)

- Must prominently display the following on each webpage: name as it appears on license, phone number or email address, and the last date property information on the site was revised (unless updated automatically via MLS).
- If advertising on behalf of or in conjunction with another licensee, include the name, phone number, and email of both the advertising supervising licensee and the licensee with whom they have such business relationship on applicable internet sites.

Internet Site Advertising (Supervised Licensees/Associate Brokers and Salespeople)

- Must prominently display on each webpage: name as it appears on license, phone number or email address, and the last date property information on site was revised (unless updated automatically as changes are made in MLS).
- Must include the name of supervising licensee.
- Must include the supervising licensee's phone number or email address.
- The supervising licensee's information must be at least the same size font as the supervised licensee.

Advertising under DOS Guidelines

What is an advertisement?

Promotion and solicitation related to licensed real estate activity, including but not limited to advertising via:

- mail
- telephone
- websites
- e-mail
- electronic bulletin boards
- business cards
- Signs/billboards
- Flyers
- Video

What is not an advertisement?

Commentary made by a duly licensed real estate salesperson, real estate associate broker or real estate broker that is not related to promoting licensed real estate activity. 175.25(a)(1)

*******NOTE: ALL ADVERTISEMENTS MUST BE APPROVED BY PRINCIPAL BROKER**

Advertising – generally

- Only a real estate broker is permitted to place, or cause to be placed, advertisements.
- Advertisements must provide the name of the real estate brokerage (or broker if individual broker) and either the brokerages:
 - o (i) full address or
 - o (ii) telephone
- No regulation on size
- Real Estate Brokerage must be included in advertisement
- Licensees name must appear as it is on license – nicknames can be included as long as licensed name is conspicuous

License Type

- License Type: Associate Real Estate Broker or Real Estate Salesperson
- The use of “Licensed” is no longer mandatory. However, if you list your designations after your name “Licensed” must be used
- Not necessary on for sale signs or classified ads unless you are including a designation

Telephone Numbers

- Phone numbers must identify the type of number, i.e. cell, home, office
- Brokerage phone number **or** address must appear on every advertisement

Classified Ads

- Must include name of brokerage
- Does not need license type
- Must have either brokerage phone **or** address
- Phone other than brokerage must be clearly identified

Business Cards

- Must have brokerage address
- Must have brokerage name
- Must contain license type
- Office telephone number
 - Must have a variation of “Each Office Is Independently Owned and Operated” (Franchise Requirement)

For Sale Signs

- Must include name of brokerage. *“Generally, advertisements need to contain the name of the brokerage and the brokerage address or office telephone number. For sale signs are one of the exceptions to the general rule”*
- All phone numbers must be identified

Open House Signs

- Not required to comply with requirements unless there is information of the licensee or brokerage. If licensee name appears on the sign so must the full licensed name of the brokerage. If licensee name is on the sign it must be the full licensed name.

Email

- Initial email must include all information required by these regulations
 - Brokerage name
 - Brokerage address or phone
 - Licensee Type
 - All phone numbers identified

Logos

- Individual logos may be used provided the name or logo of the brokerage is provided

Web based advertising

- Each page of website must include the brokerage information: Brokerage name and address **or** phone #
- Link to brokerage website must be on home page
- Link to the Department of State’s Fair Housing Notice must be installed on homepage and be displayed “prominently” not hidden or buried on the homepage

Social Media

- Home or profile page must have:

- Name of brokerage
- Brokerage address or phone #
- License Type
- Phone numbers identified

Teams

- 2 or more persons, one of whom must be an Associate RE Broker
- Associated with the same brokerage
- Team Names:
 - Full licensed name of the real estate brokers, associate brokers or RE salespersons **or**
 - If the names are not included, team name must be immediately followed by “at/of [full name of brokerage]
 - Must use the term team (cannot use associate, realty, group etc)
 - Cannot use the name of a non-licensed individual is prohibited

Fair Housing

- Fair Housing notice must be displayed at all Open Houses
- Fair Housing Disclosure must be available to all attendees and presented at “First Substantive Contact”

AMP - Agent Master Program

AMP is a 2 week, 5 session, training program that we have created to help new emerging agents, and experienced agents that would like to boost their career.

Participating in the program also allows for the agents to work with our Directors of Agent Development. These directors are available for additional training, one on one coaching sessions, and help working a deal through to closing.

In the program you will learn:

- Mindset, Attitude and Goals
- CRM Management
- Lead Generation
- Lead Conversion
- Marketing
- RE/MAX Marketing Tools

BackOffice

You will receive an invitation to RE/MAX Town & Country workspace on BoldTrail BackOffice. **BackOffice** is the system we use to keep all of your real estate transactions, paperwork, and commissions organized in one place. It makes it easier for you to upload documents, track deals, and get paid quickly and accurately.

You will be asked to get started by creating a password when you enter the system.

For more information on how to Navigate the System you can check this guide....[click here](#)

Please check the training calendar for future training classes.

BoldTrail

BoldTrail is the centralized BackOffice platform that helps RE/MAX agents manage their business more efficiently. From transaction management to marketing tools, BoldTrail keeps everything in one place so you can stay organized, compliant, and focused on selling more real estate. Bold Trail is accessed from remax.net under Apps & Tools, Platform: MAX/Tech powered by BoldTrail

Key Features & Benefits

- **Transaction Management** – Submit, review, and track all transaction paperwork in one streamlined system.
- **eSign Integration** – Send and manage documents for electronic signature with ease.
- **Compliance Tracking** – Monitor document status and stay on top of office and MLS requirements.
- **Marketing Tools** – Access customizable templates, email campaigns, and automation to promote listings and services.
- **Smart Campaigns** – Automate follow-ups and nurture leads with prebuilt or custom drip campaigns.
- **Lead Routing & Tracking** – Capture leads and track them through the pipeline from initial inquiry to closing.
- **Goal Setting & Performance Dashboards** – Track production goals, monitor progress, and measure results.
- **File Storage** – Keep contracts, disclosures, and marketing materials organized and accessible anytime.
- **Company Resources** – Access office policies, training materials, and forms directly inside the platform.

Closing Procedures

- All DOS/DCP-required paperwork must be uploaded and submitted for review before the transaction is marked Pending/UC in the BackOffice
- CFO or COO will change the transaction from Pending to Closed
- Upload Commission Invoice
- Bring check into the office or ask for the account number to make the deposit. The address of the closing **MUST** be entered on the check memo.
- If you are depositing the check in the bank, upload a picture of the check and deposit slip into your transaction checklist and **submit for review**. This notifies the office a deposit has been made.
- Make sure your transaction is complete, submitted and approved.

If all of the above systems are followed and the transaction is approved, check turnaround will be within 24 hours.

Commission Advances

The Broker will not execute or be a party to any Commission Advance agreements on behalf of an Agent, due to issues previously experienced with such arrangements.

Conditional Contract Procedures

When your contracts are signed on both sides it is time to inform the office of your pending closing.

- You will receive an email from the Director of Agent Services or the Compliance Officer asking you to upload your transaction paperwork to BackOffice (must be in PDF format) and submit the Transaction Details form within 24 hours of contract signing
 - The Transaction Detail form is the documentation that specifies transaction details and calculates commission
 - **Submit** the transaction for review

Paperwork for Conditional Contracts:

Listings:

- **SUBMIT A TRANSACTION DETAIL**
- Uploaded fully executed lead paint if the property is built prior to 1978
- Upload Offer to Purchase
- Upload Memo of Agreement

Buyers:

- **SUBMIT A TRANSACTION DETAIL**
- Email all paperwork (agency disclosure, **fully executed lead paint**, any pertinent signed disclosures)
- Upload Offer to Purchase
- Upload Memo of Agreement
- Agent full in contract status – used for lead paint validation

TIPS:

- If you have an in-office deal, the transaction type is Both Listing Sold and Buyer Sale – this applies to Sales and Rentals. The listing agent will be Agent 1 and the buyer agent will be Agent 2

Copier

Copy code is 0+the last 4 digits of your cell phone #
Ex. 845-724-9612: user code would be 09612

Copier features:

- Printing

- Copies

- Scan to email

Department of Consumer Protection (DCP)

Broker's UID: REB.0792170

DCP phone number: 860-713-6000

DOS URL: <https://portal.ct.gov/>

Renewing your Real Estate License:

- After completing your 22.5 hours of continuing education, logon to DCP: <https://www.elicense.ct.gov/> and select "Renewal" under "Activities"
- Select the license, permit or registration you wish to renew and click "Start"

Required courses needed to maintain real estate license:

- Salesperson licenses expire annually on **May 31st**.
- Renewal notices will be emailed and mailed to all active salespersons approximately 30-45 days prior to March 31st.
- You are required to complete 12 hours of continuing education on an even year
- As a licensee in another state, you may however submit certificates of completion for CE completed for another state's license to the Department for consideration toward equivalency credit for the elective portion **ONLY** of the CE.
- To be approved, EACH course must be a minimum of 3 hours and be taken during the current CT CE cycle.
- To find out more information on CT continuing education requirements:
 - <https://portal.ct.gov/DCP/Real-Estate/Real-Estate-Education-and-Exam-Information>
 - 12 Hours of continuing education must include:
 - 3 Hours "Fair Housing" (**mandatory** for 2016-2018 CE cycle). Not all Fair Housing classes meet this requirement (It should specifically say it's the **mandatory** class for 2016-2018).
 - 9 Hours of approved Real Estate Elective courses.

Non-Reciprocal License (for Connecticut)

Prerequisites:

- Have an active license in good standing in the non-reciprocal state.
- Fill out this form to receive your license history from NY:
<https://dos.ny.gov/system/files/documents/2019/11/0999-f.pdf>
- Required to take the state portion of the Connecticut Real Estate Licensing Exam administered by PSI
- For Salesperson applicants - Sponsoring broker must have an "active" Connecticut broker license

Required Documentation:

- Completed notarized application;
- Certification of license history received directly from the non-Reciprocal State. The license history must confirm you have an active license issued by examination;
- Certification of license history received directly from all other states in which you were ever issued a real estate license.

Application Fees:

- **Broker:** \$705.00 (\$120.00 application fee*; \$565.00 initial license fee; \$20.00 guaranty fund) *application fee is non-refundable.
- **Salesperson:** \$385.00 (\$80.00 application fee*; \$285.00 initial license fee; \$20.00 guaranty fund) *application fee is non-refundable.

Application link for Non-Reciprocal State Applicants

<https://portal.ct.gov/-/media/dcp/licensing/real-estate/new-re-non-reciprocal-states.pdf>

You can prep for the State Portion for the exam with this site:

<https://www.psonlinestore.com/real-estate-license-exam-prep-4th-edition/>

DOS: Department of State

Broker's UID: 10991228252

Principal Office UID: 10491208345 (Fishkill)

Branch Office UID:

- Yorktown: 10391202807
- Central Valley: 10391202997
- Warwick: 10391203055

DOS phone number: 518-474-4429

DOS URL: <http://www.dos.ny.gov/>

Renewing your Real Estate License:

- After completing your 22.5 hours of continuing education, logon to DOS (see URL above) and select your license from your List of Licenses. Choose Renew Your License from the next menu.

Required courses needed to maintain real estate license:

- You are required to take an **ETHICS** course every 2 years
- You are required to take **FAIR HOUSING** every 2 years
- **Reciprocal License - If education is completed outside of New York State**
 - The 77-hour real estate education requirement if you can document an equivalent level of schooling. You must submit the following documents:
 - An official transcript from an accredited college or University indicating satisfactory completion of the course(s) you would like us to consider, or an original Certificate of Course Completion from a recognized real estate school.
 - An official description of the subject matter. This can usually be obtained from a school catalog.
 - Send these, along with a letter requesting a waiver of the qualifying education requirements to: Department of State Division of Licensing Services Bureau of Educational Standards P.O. Box 22001 Albany, NY 12201-2001
 - As a matter of policy, the following courses will not be approved:
 - Continuing education courses
 - Correspondence courses
 - Paralegal
 - Upon approval of your education, you will find information on how to register and schedule your examination on our website at www.dos.ny.gov. After you pass the examination, you must submit the application form, original waiver letter and fee. This must be done within two years of the date you passed the examination.

DOS Forms Policies

Buyer Folder:

- **Agency** – Buyer needs to be disclosed at first substantive contact, the first meeting between the licensee and the public where there is a discussion of information regarding real estate.
- Agency disclosure is not a contract and does not make your buyer a client
 - What needs to be checked:

This form was provided to me by Agent Name of RE/MAX Town & Country
(Print Name of Licensee) *(Print Name of Company, Firm or Brokerage)*

a licensed real estate broker acting in the interest of the:

<input type="checkbox"/> Seller as a <i>(check relationship below)</i>	<input checked="" type="checkbox"/> Buyer as a <i>(check relationship below)</i>
<input type="checkbox"/> Seller's Agent	<input checked="" type="checkbox"/> Buyer's Agent
<input type="checkbox"/> Broker's Agent	<input type="checkbox"/> Broker's Agent

Yellow arrows point to the 'Agent Name' field, the 'RE/MAX Town & Country' field, the 'Buyer as a' checkbox, and the 'Buyer's Agent' checkbox.

- **Advanced Consent to Dual Agency** – as a buyer's agent if you show a buyer one of your listings or an office listing you are in a dual agency situation. You can discuss this with your buyer and have them sign the Advanced Consent to Dual Agency section. If it is not signed at first conversation you must remember to disclose if you show one of your listings or an office listing.
- If a buyer wants to make an offer on your listing or an office listing another Agency Disclosure must be signed stating that you are either in Dual Agency or Dual Agency with Designated Agents.
- **Exclusive Buyer Agency Compensation Agreement:**
 - Legally Binding Contract
 - **Must be discussed and signed with buyer before any homes are shown**
 - Protects your compensation if the seller is not offering compensation to buyer's agents

1. COMPENSATION:

INITIAL INITIAL

PLEASE INITIAL: Compensation is not set by law or any Realtor® association or MLS and that compensation to BROKER is fully negotiable between the BUYER and the BROKER.

The buyer agent cannot receive more than the seller is giving on the ERS. Make sure your % is high enough

BUYER agrees that the BROKER shall receive compensation if BUYER or any other person acting on BUYER's behalf buys, exchanges for, obtains an option on, or leases real property located and/or shown by the BROKER to the BUYER. BUYER agrees that BROKER shall be compensated \$ [] or [] % of the purchase price of the property or [] % of the aggregate rental of the Lease and all options as exercised or \$ [], which sum shall become due and payable when BROKER brings about a meeting of the minds between BUYER and the seller/lessor. BROKER is authorized to have the agreed upon compensation paid by the Seller or the Listing Broker under the Purchase Agreement or otherwise except as set forth in section 4(c) or 4(d). However, to the extent that the agreed upon compensation is not paid to BROKER by the Seller or the Listing Broker, BUYER shall be fully responsible to BROKER for the difference between the agreed upon compensation and any amount received by BROKER from the Seller and/or Listing Broker. If BUYER and BROKER agree to dual agency or dual agency with designated sales agents (see section 4(c) and 4(d)), the BUYER shall be responsible for compensating the BROKER the full amount set forth above unless otherwise negotiated and memorialized in writing. BROKER may not receive compensation from any source that exceeds the amount or rate agreed to with the BUYER unless the BROKER and BUYER have agreed to the additional compensation in writing.

You are entitled to take a retainer fee from a buyer to protect your time from a buyer who "ghosts" you

BUYER shall pay BROKER a retainer fee of \$ [] upon signing this AGREEMENT, which shall be credited against the commission received by BROKER upon the consummation of a transaction by BUYER.

BUYER acknowledges that if within [] days of the termination of this AGREEMENT, with or without the services of a licensed agent, BUYER buys, exchanges for, obtains an option on, or leases real property shown to BUYER by BROKER during the term of this AGREEMENT, compensation as set forth in this AGREEMENT shall be applicable and BUYER shall pay such fee to BROKER.

Offer to Purchase

- Total purchase price includes seller concession
• FHA and VA loans approve up to 6% concession towards closing costs

Listing Folder

- Agency

- Seller needs to be disclosed at first substantive contact, the first meeting between the licensee and the public where there is a discussion of information regarding real estate.
■ Agency disclosure is not a contract and does not make your seller a client. The Exclusive Right to Sell creates the client relationship

o What needs to be checked

This form was provided to me by Agent Name of RE/MAX Town and Country

a licensed real estate broker acting in the interest of the:

Form with checkboxes for Seller as a (check relationship below) and Buyer as a (check relationship below), including options like Seller's Agent, Buyer's Agent, Broker's Agent, Dual Agent, and Dual Agent with Designated Sales Agent.

For advance informed consent to either dual agency or dual agency with designated sales agents complete section below:

Form with checkboxes for Advance Informed Consent Dual Agency and Advance Informed Consent to Dual Agency with Designated Sales Agents.

- **Exclusive Right to Sell**

- Effective date must be filled in the date you sign the listing, this is the date the contract becomes enforceable. If you are not putting the listing on MLS within 24 hours use additional points to cover the period lag. Example: will be uploaded to MLS after professional photos.
- Compensation – we only pay Buyer’s agents. Sub-agents represent the seller. We do not endorse cooperating agents representing our sellers. Broker’s agents represent the brokerage they work for. Again, we don’t want another brokerage representing our seller.

Paperwork Required (Underlined Items are REQUIRED by NY State law, **Red lettering is Required by RE/MAX TNC)**

Listing Loop	Buyer Loop
Stage: New Listing	
<u>NYS Agency Disclosure (Advanced Consent to Dual ✓)</u>	
ERS/ERR (Must be uploaded to Matrix)	
<u>Fair Housing</u>	
<u>Lead Paint (If built prior to 1978)</u>	
Property Condition Disclosure Acknowledgement	
Carbon Monoxide Regulations* if applicable (If agent discusses law must be in loop, otherwise attorney handles)	
Listing Sheet from MLS	
Stage: Conditional Contract	Stage: Conditional Contract – Loop renamed to address
Referral Form (If Applicable)	<u>Agency Disclosure (Advanced Consent to Dual ✓)</u>
Offer to Purchase	<u>NYS Agency Disclosure (Dual)</u> if applicable
Memo of Agreement	<u>Exclusive Right to Represent (if applicable)</u>
Commission Bill	<u>Fair Housing Disclosure</u>

Listing Sheet from MLS I	<u>Lead Paint (if applicable)</u>
	Property Condition Disclosure Acknowledgement
	Carbon Monoxide Regulations* if applicable (If agent discusses law must be in loop, otherwise attorney handles)
	Referral Form (If Applicable)
	Offer to Purchase
	Memo of Agreement
	Commission Bill
	Listing Sheet from MLS
**FOR ALL CONDITIONAL CONTRACTS, TRANSACTION DETAILS MUST BE COMPLETED AND SUBMITTED	
Stage: Status/Price Change	
Status Change Form	
Stage: Closing	Stage: Closing
Listing Sheet from MLS with SOLD Status	Listing Sheet from MLS with SOLD Status
Copy of Check	Copy of Check

File Sharing

On tncresources.com a **file sharing** library has been created where we can exchange training materials, listing/buying presentations and community resources.

To upload material to share with fellow agents

- tncresources.com
- File Share



+ File

-
- You will need to login to upload a file (Reach out to leadership if you don't remember your login email)
- Only files can be uploaded(Folders cannot be created at this level)
- Once uploaded all agents will have access to the file

Google Drive

The google drive will be shared with you via email. The initial invitation will come from rmxtndocuments@gmail.com.

If you have a google account, you will also be able to access it by going into your personal drive and clicking 'Shared with me' on the left hand side.

The Drive includes resources regarding;

- Checklists
- Coaching
- Disclosures
- FSBOs
- Jumpstart Classes
- Logos
- Prospecting Letters
- Scripts
- State Exam
- Zoom Training Recordings
- And More!

Google Group

- To send an email to the entire office use tnc-agents@googlegroups.com
- You are added to this group when you join RE/MAX Town & Country

Growth Bonus

Because of your effort to help us grow RE/MAX Town & Country, we offer a growth bonus to you for any agent that signs on with us due to your influence. - If we sign on a producer whose volume is 3 Million or less you will receive \$250. \$125 at sign on and \$125 at 6 months. - If we sign on a producer whose volume is over 3 Million you will receive \$500. \$250 at sign on and \$250 at 6 months.

HUD

We are a HUD certified broker. The Hud website is www.hudhomestore.com.

NY NAID ID: PYSCKS0462

CT NAID ID: PYSCKS0463

To place a bid:

Select Bidder

Bidder Registration

HUD-registered Selling Brokers, Nonprofits, and Government Agencies must register with this site in order to submit and review bids. Selling Agents and Associate Brokers: You must wait to register until after the Principal Broker with the NAID has registered on HUD Homestore (you can check this in part 1 below). For your registration, you will need to know the Principal Broker's NAID.

INTERNET

Office	Network	Password
Fishkill	ORBI41	sunnycomet963
Warwick		
Danbury	Comcast	

Lead Concierge

What is MAXTech Lead Concierge? Lead Concierge services are designed to (1) improve the REMAX customer experience for remax.com visitors who request information but never hear back, (2) support REMAX agents who are unable to respond to inquiries right away, and (3) ensure that incoming leads are skillfully nurtured into conversation-ready buyers, and (4) improve the overall quality of leads delivered to REMAX agents.

How does the Lead Concierge program work? When a non-REMAX listing lead comes into remax.com, a concierge immediately reaches out to establish contact. The concierge works to qualify the lead, and once the lead is deemed conversation-ready, the concierge passes it to an opted-in agent. If the agent closes a sale, they pay a 30% referral fee – 5% of which goes to the brokerage.

Beginning in May 2025, the Lead Concierge began processing leads generated from REMAX listings. Please see the Your Listing Your Lead section for information.

In September 2025, leads from global.remax.com on U.S. properties and leads from the REMAX Home Buyer and Seller's Guides are now eligible for MAXTech Lead Concierge

How does a REMAX affiliate opt into MAXTech Lead Concierge to receive Lead Concierge eligible leads from [remax.com](https://www.remax.com)?

- Go to MAXTech powered by BoldTrail through MAXCenter
- Navigate to the BoldTrail Marketplace
- Click on the MAXTech Lead Concierge tile
- Opt in

Legal Hot Line NY and CT

Free legal information and advice is available to NYSAR members through **NYSAR's legal hotline**.

The Legal Hotline is available Monday-Friday from 9:00am-4:00pm at **518-436-9727**.

Connecticut has a legal hotline for realtors through the **Greater Hartford Association of REALTORS®**. The number is **(860) 566-8333**, and you can also email **hotline@ctrealtors.com**

MLS

- Hudson Gateway Association of Realtors

914-681-0833 (phone)

914-681-6044 (fax)

Office Id: RMXTNC (Fishkill)
RMXTNC04 (Warwick)

www.hgar.com

- SMART MLS (CT)

203-750-6000 (phone)

203-840-6678 (fax)

Office Id: RMTC01

www.smartmls.com

TIPS

- The listing must be entered into the **OneKey** MLS within 24 hours of the effective date.
- The listing must be entered into SMART MLS within 48 hours of signing the listing agreement

Monthly Invoices

Your invoice is sent on the 10th of the month for you to verify its accuracy. If you should find any discrepancies, please contact the Chief of Finance for corrections to be made. All payments are due on the 20th of the month and all corrections must be made prior. Your invoice can be made by check, cash, or via vemno (@remax-tnc)

Office Leasing Fees: Offices are rented at \$40 Sq. Ft.

New Listing Procedures

When you take a new listing you will get your paperwork from BackOffice by starting a transaction. When paperwork is signed, either by e-sign or uploaded with wet signatures, you must submit the transaction for review within 48 hours of the listing being live on MLS.

General guideline for listing forms:

- o Agency Disclosure
- o ERS/ERR
- o Fair Housing
- o Lead Paint (if home built prior 1978)
- o Property Condition Disclosure Acknowledgement (if applicable)
- o Carbon Monoxide

***Any addendums, status change forms, name withheld must be uploaded to the transaction and can be found in the Listing Misc Forms folder (NY) in the company library. All CT forms can be found and added to the transaction from SMART MLS or CT Realtors®**

Opcity/Realtor.com

Opcity is a lead generating program. Leads will be dispersed throughout the office via text or notification (based on how you have your profile set). The leads are sent to multiple people at a time and the first to grab the lead is the one who will be connected with the lead.

On the ReadyConnect Concierge (formerly Opcity) platform, there are two paths for agents: Emerging and Experienced. The two levels are nearly identical, the only difference is an Emerging agent does not have the option to tailor their price points or remove specific zip codes in their settings. Both levels receive pre-screened referrals via a live 3-way introduction assuming it's a client they've agreed to work with. The benefits of the Emerging Agent program are;

An opportunity for your motivated agents to build their sphere

- Buyer and Seller referrals that can help your agent build their reputation
- ReadyConnect Concierge's simple CRM provides a great way for the agent to learn how to succeed with online referrals with zero up-front cost.

Once an agent closes three referrals on the Emerging path (and remember, a lease is considered a close!), they'll automatically shift to the Experienced path and will have the ability to customize their settings

Client Rewards clients are clients that opcity has said, if they close with the agent that they are initially set up with, they will receive cash back after closing. These clients will have an extra 3% on their referral fee to opcity, which is stated on the notification before you accept or decline a lead. The 30% and 35% referral fees would then be 33% or 38% respectively. In addition, once you start working with a client we advise that you deal with them directly versus through the opcity app.

Close 3 deals through opcity on the emerging path, then you go to an experienced agent.

Opcity has a concierge program that calls the buyer after the closing to help set up their new utilities. Buyers that have closed will start receiving phone calls and emails about setting up their utilities.

You agree to pay Opcity a percentage of the Gross Commissions (the "Service Fees") for client-side real estate brokerage services and real estate agency services on any and all real estate transactions (including leases and subsequent lease commissions on a property sold) involving the Referral for a period of twenty-four (24) months following the Referral (the "Referral Coverage Period"). The specific Service Fee charged will be up to 40% depending upon the type of lead and any promotional programs currently in effect at the time of the Referral. Said Service Fee will be specified in each Cooperative Brokerage Referral Agreement. Visit support.realtor.com and select "Opcity Help" from the navigation, or call us at 855.997.1961.

Personal Transactions

When a RE/MAX Town & Country agent acts as a seller or buyer in a transaction, 10% of the 2.5% (or Higher) commission will be retained by the broker. This does not count towards the company cap.

Photofy

What is Photofy?

Photofy is a content creation tool made for iOS and Android mobile devices. Photofy allows everyone to capture your favorite moments and enhance them with artwork, stickers, frames and more, so you can show them off on the social media network of your choice. Photofy allows businesses, large and small, to manage logos, and other brand elements so they can empower their employees, consultants, etc. to create beautiful, branded content for all of their social channels.

Why should I create a Photofy account?

RE/MAX has partnered with Photofy to bring you RE/MAX branded content right from the app. To access it, though, you will need to set-up an account.

Creating an account will give you access to these great Photofy features:

- RE/MAX branded content
- Saved purchases to the user account
- Access to free rewards
- Access to purchased content on phone and tablets

How do I sign up?

Follow these simple steps to get you and your office(s) started with Photofy:

1. Navigate to photofy.com/remax-invite
2. Click Get Started
3. Enter your information
4. Enter your Broker ID or Agent ID (it is also referred to as your MCID)
5. Click Continue
6. Accept the Terms and Agreements
7. Update your account information
8. Create password
9. Download the app, login, and enjoy!

RE/MAX International Facts

RE/MAX stands for **Real Estate Maximums**.

While **RE/MAX** is the most recognizable real estate brand in the world, few may know what it stands for. **RE/MAX** stands for **Real Estate Maximums**. In fact, Dave and Gail Liniger decided to call their new business concept **Real Estate Maximums** and then coined the phrase **RE/MAX**.

The International website is: **www.remax.com**

The RE/MAX back office is www.remax.net

- Your userid is your RE/MAX email address
- Use the password you set when you activated your email address

Each year, on your anniversary, a \$410 RE/MAX Annual Dues will be billed to you. Payment is taken care of through “My Account” on www.remax.net. When you sign up with RE/MAX you are charged this fee and then each year on your anniversary. This fee can be set up to be paid in installments.

RE/MAX Miracle System

RE/MAX agents help Children's Miracle Network Hospitals support millions of kids each year treated at member hospitals in the U.S. and Canada. All donations stay local and add up to make a big impact towards changing kids' health in your community.

The local hospital we support is **MARIA FARERI CHILDREN'S HOSPITAL in Valhalla.**

Donations can be made directly on the app on remax.net.

1. Sign up to become a Miracle Agent
 - a. You are given the tools and resources that help you market your Miracle Homes or Miracle Properties.
 - b. Any agent who contributes \$500 or more in a calendar year to their local CMN Hospital through the Miracle System will receive special recognition as a Miracle Agent.
2. Donate on behalf of your clients after every home sale
 - a. Send an Honor Card to our clients letting them know a donation has been made on their behalf.
 - b. To send an Honor Card to clients requires a donation of \$30 per card however; you can donate \$5, \$50 or more after each transaction.
3. Create lasting relationships
 - a. Supporting children's hospitals lets your clients and community members know that Re/MAX agents do good.

Rental Clients

Tenant screening for landlords:

www.mysmartmove.com

RentSpree

Landlords can create an account and charge tenants for the report to get accurate credit information, criminal and eviction reports.

On HGAR and remax.net: RentSpree

Rent Aid Programs

If your tenant client's voucher covers the entire month's rent, the law states they cannot be subject to a credit check. If a criminal background check is required, they are subject to this requirement as is any other applicant.

If the voucher does not cover the entire rent amount, it is up to the landlord's discretion if a credit check will be necessary, usually based on the amount that needs to be covered by the tenant.

This information was validated by the NYSAR legal hotline. Please let me know if you have any questions or concerns.

Showing Time

ShowingTime is a real estate scheduling and showing management platform. The app can be downloaded from the App Store (iPhone) or Google Play(Android)

It allows agents to:

- Schedule property showings online or via the mobile app.
- Automatically confirm or request appointments with sellers and listing agents.
- Provide feedback after showings.
- Track showing activity and reports for clients.

For sellers, it makes the process easier because they don't get multiple calls/texts from different agents—everything is managed through the system. For agents, it saves time and keeps all showing details in one place.

ShowingTime Quick Start Guide

1. Accessing ShowingTime

- **MLS Login:** Most MLS systems link directly to ShowingTime from the listing.
 - **Mobile App:** Download the *ShowingTime* app (iOS/Android) and log in with your MLS credentials.
-

2. Scheduling a Showing

- From MLS or the app, click **Schedule a Showing**.
 - Choose your desired **date and time**.
 - Submit the request – the seller or listing agent will confirm.
-

3. Approving/Declining Showings (for Sellers)

- Sellers receive showing requests via app, email, or text.
 - They can **Approve**, **Decline**, or **Suggest Another Time** with one click.
-

4. After the Showing

- Buyer's agents are prompted automatically to provide **feedback**.
- Feedback is shared with the listing agent and seller (if applicable).

5. Tracking Activity

- Listing agents can view **all showing activity** and generate reports for sellers.
 - Helps demonstrate market interest and track feedback trends.
-

Tips for Success

- Always **confirm your showing time** before heading out.
- Keep your **notifications on** in the app for real-time updates.
- Provide **timely feedback** after each showing – it builds trust with colleagues and clients.

Important Information:

- **After 60 days, if you do not have a showing request, you and the seller will receive a text from showing time to opt in for messages. If you do not opt back in, you will not receive any new notifications for showings, appraisals, etc.** However, if you also have email notification checked for you and your seller, you will continue to receive email notifications. **If you see your phone number displayed in red within the ShowingTime system, please double-click on the red number and click "Agree" in the pop-up window. This will trigger the opt-in SMS, which you will need to reply to in order to start receiving text notifications again.**
- When a new mobile number is added to the ShowingTime system, or after 60 days of inactivity for an existing mobile number, ShowingTime will send a text message to opt-in to text messages again. It will state:

"ShowingTime would like to text you about showing appointments. Reply START to receive text messages from ShowingTime. Msg frequency varies. Msg & data rates may apply. Reply HELP for help. Reply STOP to cancel."

- ***Owner/Occupants will receive the initial SMS to opt in once the listing gets its first appointment after they've been added.***
- ***Additional texts will be paused until we receive confirmation. We will resend the prompt to ensure receipt.***
- ***Once confirmation is received, any messages that were not sent while waiting for the opt-in will be delivered.***
- ***The recipient can also opt back in by texting START to 847-865-6549 in the case they deleted the initial message***

Stickers

RE/MAX Stickers for Android

Sending Stickers in a Text Message

NOTE – TO SEND STICKERS IN ANY MESSAGING APP OTHER THAN WHATSAPP YOU MUST HAVE GBOARD INSTALLED AND SELECTED

1. Open your messaging application
2. On the bottom of the keyboard, look for your Emoji icon (usually a smiley face near the space bar)
3. Click on the Stickers icon (Usually a square with a smiley face and corner “peeled” up)
4. On the icon bar, slide right to left, if needed, till you find the RE/MAX Balloon icon
5. Select the RE/MAX Balloon icon
6. Select the sticker you want, type your message and you are ready to send!

Adding Stickers to a Photo

Currently, there is no standard application on Android to add stickers to a photo, please see instructions below

1. Open the Photofy app
2. Click on ‘Photos and Collages’
3. Near the top, choose from RE/MAX, ALL, STOCK, GOOGLE DRIVE, or DROPBOX
4. Select your photo(s) and click ‘Continue’
 - a. If you select multiple photos proceed to step ‘i’ below, else continue to step 5
 - i. After selecting your photos, click ‘Continue’
 - ii. On the next screen, select the template for how the photos will be laid out, you can also adjust what part of the photo is seen, then click the Check Mark
5. On the bottom of the screen, you will select the option to ‘Add Text & Overlays’
6. At the bottom of the page you will have many options, RE/MAX stickers are under the ‘Artwork’ icon with a RE/MAX Balloon
 - a. You can also add different stickers by clicking on the ‘Stickers’ option
 - b. Or you can add a frame by clicking on ‘Frames’
7. Once you are done with stickers, icons, or frames, click the Check Mark in the top right-hand corner
8. From this last page you will be able to share via Social Media, send as a text message, and other options

RE/MAX Stickers for iOS (E.g., iPhone, iPad)

Sending Stickers in a Text Message

You can send stickers just like an emoji within text message conversation.

1. Open ‘Messages’
2. In the Icon bar below where you type your message, slide right to left until you see the RE/MAX Balloon Icon
3. Select the RE/MAX Balloon Icon
4. Find and tap on the sticker you want to send, then click the send button

Adding Stickers to a New Photo Taken within Messages

WARNING – SOME STICKERS MAY NOT WORK USING THIS METHOD

1. Open 'Messages'
 2. Find your contact or create a message to the contact
 3. Click the Camera button to the left of the messaging bar
 4. Take your photo
 5. After taking your photo, click on Effects (Star looking icon)
 6. Find the RE/MAX Balloon in the bottom left corner, may have to slide the menu to find this option
 7. Tap on the sticker you want to use
 - a. If you need to delete the sticker because it does not work, tap on the sticker then select the X in the corner to delete the sticker
 8. Adjust the sticker by dragging it around to move it or zoom in or out to adjust the size 9.
- When you are done, click 'Done' in the top right and complete your message as normal

Training Calendar

The training calendar is under the training tab on tncresources.com

If you have a gmail account, you can add the calendar to your own and it will always be synced to your personal calendar with the option to turn it on and off. The training calendar is on www.remaxtowncountryny@gmail.com

In order to participate in a training class listed on the training calendar, you must go into the event and reply that you will be attending, or rsvp to the event in the email notification you receive when you are invited to the event.

Most training classes are offered via zoom and in person in the office.

Unlicensed Assistant Activities

DCP Regulations

In Connecticut, an unlicensed real estate assistant can handle administrative and clerical duties, such as preparing documents, scheduling appointments, submitting listings to an MLS, and coordinating repairs, but cannot perform activities that require a real estate license, including negotiating on behalf of a client or showing property to prospects. They must work under the direct supervision of a licensed real estate agent or broker, who remains responsible for their actions.

Permitted Activities

An unlicensed assistant can perform many tasks to support a licensed agent, including:

- Administrative tasks: Answering phones, taking messages, forwarding calls, and filing.
- Clerical duties: Typing contract forms, preparing commission checks, and assembling closing documents.
- Advertising: Writing and placing ads, flyers, and other promotional materials for a licensee's review and approval.
- MLS support: Submitting new listings and changes to a Multiple Listing Service (MLS).
- Public information retrieval: Obtaining public documents from various sources like town halls and courthouses.
- Property sign placement: Placing and removing "For Sale" or "For Rent" signs on property.
- Scheduling: Arranging appointments for showings, inspections, and closings.
- Research: Gathering information for a [Comparative Market Analysis](#) (CMA).
- Courier services: Acting as a courier to deliver documents or pick up keys.
- Repairs: Ordering and supervising routine repairs.
- Open House attendance: Being present at a property during a licensed tour or showing.

Prohibited Activities

An unlicensed assistant cannot perform any task that constitutes a "real estate act," which includes:

- Showing property to clients or prospects.
- Hosting open houses or property kiosks.
- Negotiating any part of a real estate transaction.
- Discussing marketing or negotiation tactics with clients.
- Soliciting clients for the sale or purchase of real estate.
- Handling property showings without the presence of a licensed agent.

DOS Regulations

Permitted Activities

An unlicensed real estate assistant can perform the following duties under the supervision of a licensed broker or salesperson:

- **General Office Duties:** Make phone calls, send emails, and file documents.
- **Marketing and Promotion:** Prepare flyers, advertisements, and other promotional information for broker approval.
- **Property Access:** Place or remove "For Sale" or "For Rent" signs on properties.
- **Scheduling:** Schedule appointments for showings, inspections, and closings.
- **Information Gathering:** Collect data and prepare preliminary information for comparative market analyses and appraisals.
- **Document Preparation:** Assist in preparing and completing documents for a real estate transaction, for review by the licensee.
- **Courier Services:** Act as a courier or deliver documents.
- **MLS Coordination:** Submit listings and changes to the Multiple Listing Service (MLS).

Prohibited Activities

An unlicensed assistant cannot engage in any activity that requires a real estate license in New York, including:

- **Showing Properties:** They cannot show listed properties to prospective buyers or tenants.
- **Open Houses:** Hosting or supervising open houses is prohibited.
- **Discussing Listings:** They cannot discuss specific properties or details of a listing with clients or customers.
- **Negotiating:** They cannot engage in any form of negotiation for a property transaction.

Transactions: How to submit transactions

Transaction details get submitted through BackOffice. If you are using a checklist, the transaction detail form will automatically be uploaded to your transaction.

BE SURE TO SUBMIT YOUR TRANSACTION FOR COMPLIANCE REVIEW ASAP.

Transaction detail forms must be submitted within 24 hours of contracts status in any MLS. If the transaction detail is not in the transaction and submitted, your 24 hour turnaround time on your commission checks will be delayed.

Your Listing Your Lead: Floor Time Policy

At RE/MAX Town & Country you get every lead for your listing. By customizing all sections in **your RE/MAX profile** on www.remax.net, you will receive all leads on your listings via email or text, depending on your chosen options.

There is no **floor time policy** at RE/MAX Town & Country. Congruent with Your Listing Your Lead floor time policy, any call that comes into the office on your listing will be directed to you. For **non-RE/MAX** listing calls, RE/MAX Town & Country gives out the lead on a rotational basis.

If a lead comes into the office either in person or via phone call, you will be contacted first. If you do not respond or reach out to the client in a reasonable time, the lead will be passed on. You are not required to be in the office but you must be available via phone. No messages will be left for a lead.

Your Listing and Lead Concierge

How does the process work with REMAX listing leads? A remax.com lead generated by a REMAX listing will always be routed first to the listing agent. In the new framework, the listing agent will have 120 minutes to accept the lead. If the agent accepts it within 120 minutes, they work the lead as they see fit. The Lead Concierge team will not get involved.

What happens if the listing agent does not accept a lead within 120 minutes? After 120 minutes of inactivity, the lead will go to the Lead Concierge team – who will immediately begin their process of qualifying and nurturing the lead. After the lead is nurtured – which could take months to complete – the concierge will offer the cultivated lead to the listing agent again. The listing agent will be given the option to opt into the Lead Concierge program, if they are not already enrolled, and 120 minutes to accept the lead, subject to the 30% referral fee for the service of warming up and vetting the lead. The lead from the concierge will need to be accepted between 8 a.m.-8 p.m. in the agent's time zone.

If the listing agent chooses to decline the lead or not to opt into Lead Concierge, the lead will go to an opted-in agent or next best performing agent in the same office or brokerage, who has 120 minutes to accept the lead, in the agent's time zone between 8 a.m.-8 p.m.

What happens if a REMAX listing lead comes in after hours? Does the time of day impact the acceptance period? REMAX listing leads must be accepted within 120 minutes, regardless of time. Leads must be accepted 24/7.

Venmo

RE/MAX Town and Country handle → @remax-tnc

To start using Venmo:

- Download the Venmo app for [iPhone](#) or [Android](#), or go to [Venmo.com](#).
- Create a Venmo account.
- Link your account to a funding source: a bank account, debit card or credit card. **To send money:**

1. Open Venmo.
2. Tap the "Pay and Request" icon in the upper right hand corner.
3. Select a recipient by inputting @remax-tnc
4. Enter an amount and a note.
5. Tap Pay in the bottom-right corner.
6. Tap Pay when prompted.

- Money you send will be pulled from your Venmo account.
- If the account is empty or doesn't hold enough to cover your purchase, Venmo will draw the total purchase amount from the funding source you've linked to your Venmo account.

Both the sender and the recipient have to have a Venmo account.

How much does Venmo cost?

- Setting up a Venmo account and receiving money is free.
- Sending money is also free if you link your Venmo account to a bank account or debit card. ● If you link your Venmo account to a credit card, purchases are free, but there's a 3 percent fee every time you send money or fund your account.
- Standard transfers from a Venmo account to a bank account are free, but might take a few days.

Addendum A: Sexual Harassment Policy

RE/MAX Town & Country is committed to maintaining a workplace free from sexual harassment. Sexual harassment is a form of workplace discrimination. All employees are required to work in a manner that prevents sexual harassment in the workplace. This Policy is one component of RE/MAX Town & Country commitment to a discrimination-free work environment. Sexual harassment is against the law¹ and all employees have a legal right to a workplace free from sexual harassment and employees are urged to report sexual harassment by filing a complaint internally with RE/MAX Town & Country. Employees can also file a complaint with a government agency or in court under federal, state or local antidiscrimination laws.

Policy:

1. RE/MAX Town & Country policy applies to all employees, applicants for employment, interns, whether paid or unpaid, contractors and persons conducting business, regardless of immigration status, with RE/MAX Town & Country. In the remainder of this document, the term “employees” refers to this collective group.
2. Sexual harassment will not be tolerated. Any employee or individual covered by this policy who engages in sexual harassment or retaliation will be subject to remedial and/or disciplinary action (e.g., counseling, suspension, termination).
3. Retaliation Prohibition: No person covered by this Policy shall be subject to adverse action because the employee reports an incident of sexual harassment, provides information, or otherwise assists in any investigation of a sexual harassment complaint. RE/MAX Town & Country will not tolerate such retaliation against anyone who, in good faith, reports or provides information about suspected sexual harassment. Any employee of RE/MAX Town & Country who retaliates against anyone involved in a sexual harassment investigation will be subjected to disciplinary action, up to and including termination. All employees, paid or unpaid interns, or non-employees² working in the workplace who believe they have been subject to such retaliation should inform a supervisor, manager, or [*name of appropriate person*]. All employees, paid or unpaid interns or non-employees who believe they have been a target of such retaliation may also seek relief in other available forums, as explained below in the section on Legal Protections.
4. Sexual harassment is offensive, is a violation of our policies, is unlawful, and may subject RE/MAX Town & Country to liability for harm to targets of sexual harassment. Harassers may also be individually subject to liability. Employees of every level who engage in sexual harassment, including managers and supervisors who engage in sexual harassment or who allow such behavior to continue, will be penalized for such misconduct.

¹ While this policy specifically addresses sexual harassment, harassment because of and discrimination against persons of all protected classes is prohibited. In New York State, such classes include age, race, creed, color, national origin, sexual orientation, military status, sex, disability, marital status, domestic violence victim status, gender identity and criminal history.

² A non-employee is someone who is (or is employed by) a contractor, subcontractor, vendor, consultant, or anyone providing services in the workplace.

Protected non-employees include persons commonly referred to as independent contractors, "gig" workers and temporary workers. Also included are persons providing equipment repair, cleaning services or any other services provided pursuant to a contract with the employer.

5. RE/MAX Town & Country will conduct a prompt and thorough investigation that ensures due process for all parties, whenever management receives a complaint about sexual harassment, or otherwise knows of possible sexual harassment occurring. RE/MAX Town & Country will keep the investigation confidential to the extent possible. Effective corrective action will be taken whenever sexual harassment is found to have occurred. All employees, including managers and supervisors, are required to cooperate with any internal investigation of sexual harassment.
6. All employees are encouraged to report any harassment or behaviors that violate this policy. RE/MAX Town & Country will provide all employees a complaint form for employees to report harassment and file complaints.
7. Managers and supervisors are **required** to report any complaint that they receive, or any harassment that they observe or become aware of, to *[person or office designated]*.
8. This policy applies to all employees, paid or unpaid interns, and non-employees and all must follow and uphold this policy. This policy must be provided to all employees and should be posted prominently in all work locations to the extent practicable (for example, in a main office, not an offsite work location) and be provided to employees upon hiring.

What Is "Sexual Harassment"?

Sexual harassment is a form of sex discrimination and is unlawful under federal, state, and (where applicable) local law. Sexual harassment includes harassment on the basis of sex, sexual orientation, self-identified or perceived sex, gender expression, gender identity and the status of being transgender.

Sexual harassment includes unwelcome conduct which is either of a sexual nature, or which is directed at an individual because of that individual's sex when:

- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile or offensive work environment, even if the reporting individual is not the intended target of the sexual harassment;
- Such conduct is made either explicitly or implicitly a term or condition of employment; or
- Submission to or rejection of such conduct is used as the basis for employment decisions affecting an individual's employment.

A sexually harassing hostile work environment includes, but is not limited to, words, signs, jokes, pranks, intimidation or physical violence which are of a sexual nature, or which are directed at an individual because of that individual's sex. Sexual harassment also consists of any unwanted verbal or physical advances, sexually explicit derogatory statements or sexually discriminatory remarks made by someone which are offensive or objectionable to the recipient, which cause the recipient discomfort or humiliation, which interfere with the recipient's job performance.

Sexual harassment also occurs when a person in authority tries to trade job benefits for sexual favors. This can include hiring, promotion, continued employment or any other terms, conditions or privileges of employment. This is also called "quid pro quo" harassment.

Any employee who feels harassed should report so that any violation of this policy can be corrected promptly. Any harassing conduct, even a single incident, can be addressed under this policy.

Examples of sexual harassment

The following describes some of the types of acts that may be unlawful sexual harassment and that are strictly prohibited:

- Physical acts of a sexual nature, such as:
 - Touching, pinching, patting, kissing, hugging, grabbing, brushing against another employee's body or poking another employee's body;
 - Rape, sexual battery, molestation or attempts to commit these assaults.
- Unwanted sexual advances or propositions, such as:
 - Requests for sexual favors accompanied by implied or overt threats concerning the target's job performance evaluation, a promotion or other job benefits or detriments;
 - Subtle or obvious pressure for unwelcome sexual activities.
- Sexually oriented gestures, noises, remarks or jokes, or comments about a person's sexuality or sexual experience, which create a hostile work environment.
- Sex stereotyping occurs when conduct or personality traits are considered inappropriate simply because they may not conform to other people's ideas or perceptions about how individuals of a particular sex should act or look.
- Sexual or discriminatory displays or publications anywhere in the workplace, such as:
 - Displaying pictures, posters, calendars, graffiti, objects, promotional material, reading materials or other materials that are sexually demeaning or pornographic. This includes such sexual displays on workplace computers or cell phones and sharing such displays while in the workplace.
- Hostile actions taken against an individual because of that individual's sex, sexual orientation, gender identity and the status of being transgender, such as:
 - Interfering with, destroying or damaging a person's workstation, tools or equipment, or otherwise interfering with the individual's ability to perform the job;
 - Sabotaging an individual's work;
 - Bullying, yelling, name-calling.

Who can be a target of sexual harassment?

Sexual harassment can occur between any individuals, regardless of their sex or gender. New York Law protects employees, paid or unpaid interns, and non-employees, including independent contractors, and those employed by companies contracting to provide services in the workplace. Harassers can be a superior, a subordinate, a coworker or anyone in the workplace including an independent contractor, contract worker, vendor, client, customer or visitor.

Where can sexual harassment occur?

Unlawful sexual harassment is not limited to the physical workplace itself. It can occur while employees are traveling for business or at employer sponsored events or parties. Calls, texts, emails, and social media usage by employees can constitute unlawful workplace harassment, even if they occur away from the workplace premises, on personal devices or during non-work hours.

Retaliation

Unlawful retaliation can be any action that could discourage a worker from coming forward to make or support a sexual harassment claim. Adverse action need not be job-related or occur in the workplace to constitute unlawful retaliation (e.g., threats of physical violence outside of work hours).

Such retaliation is unlawful under federal, state, and (where applicable) local law. The New York State Human Rights Law protects any individual who has engaged in “protected activity.” Protected activity occurs when a person has:

- made a complaint of sexual harassment, either internally or with any anti-discrimination agency;
- testified or assisted in a proceeding involving sexual harassment under the Human Rights Law or other anti-discrimination law;
- opposed sexual harassment by making a verbal or informal complaint to management, or by simply informing a supervisor or manager of harassment;
- reported that another employee has been sexually harassed; or
- encouraged a fellow employee to report harassment.

Even if the alleged harassment does not turn out to rise to the level of a violation of law, the individual is protected from retaliation if the person had a good faith belief that the practices were unlawful. However, the retaliation provision is not intended to protect persons making intentionally false charges of harassment.

Reporting Sexual Harassment

Preventing sexual harassment is everyone’s responsibility. RE/MAX Town & Country cannot prevent or remedy sexual harassment unless it knows about it. Any employee, paid or unpaid intern or non-employee who has been subjected to behavior that may constitute sexual harassment is encouraged to report such behavior to a supervisor, manager or [*person or office designated*]. Anyone who witnesses or becomes aware of potential instances of sexual harassment should report such behavior to a supervisor, manager or [*person or office designated*].

Reports of sexual harassment may be made verbally or in writing. A form for submission of a written complaint is attached to this Policy, and all employees are encouraged to use this complaint form. Employees who are reporting sexual harassment on behalf of other employees should use the complaint form and note that it is on another employee's behalf.

Employees, paid or unpaid interns or non-employees who believe they have been a target of sexual harassment may also seek assistance in other available forums, as explained below in the section on Legal Protections.

Supervisory Responsibilities

All supervisors and managers who receive a complaint or information about suspected sexual harassment, observe what may be sexually harassing behavior or for any reason suspect that sexual harassment is occurring, **are required** to report such suspected sexual harassment to [*person or office designated*].

In addition to being subject to discipline if they engaged in sexually harassing conduct themselves, supervisors and managers will be subject to discipline for failing to report suspected sexual harassment or otherwise knowingly allowing sexual harassment to continue.

Supervisors and managers will also be subject to discipline for engaging in any retaliation.

Complaint and Investigation of Sexual Harassment

All complaints or information about sexual harassment will be investigated, whether that information was reported in verbal or written form. Investigations will be conducted in a timely manner, and will be confidential to the extent possible.

An investigation of any complaint, information or knowledge of suspected sexual harassment will be prompt and thorough, commenced immediately and completed as soon as possible. The investigation will be kept confidential to the extent possible. All persons involved, including complainants, witnesses and alleged harassers will be accorded due process, as outlined below, to protect their rights to a fair and impartial investigation.

Any employee may be required to cooperate as needed in an investigation of suspected sexual harassment. RE/MAX Town & Country will not tolerate retaliation against employees who file complaints, support another's complaint or participate in an investigation regarding a violation of this policy.

While the process may vary from case to case, investigations should be done in accordance with the following steps:

- Upon receipt of complaint, [*person or office designated*] will conduct an immediate review of the allegations, and take any interim actions (e.g., instructing the respondent to refrain from communications with the complainant), as appropriate. If complaint is verbal, encourage the individual to complete the "Complaint Form" in writing. If he or she refuses, prepare a Complaint Form based on

the verbal reporting.

- If documents, emails or phone records are relevant to the investigation, take steps to obtain and preserve them.
- Request and review all relevant documents, including all electronic communications. •

Interview all parties involved, including any relevant witnesses;

- Create a written documentation of the investigation (such as a letter, memo or email), which contains the following:
 - A list of all documents reviewed, along with a detailed summary of relevant documents; ◦ A list of names of those interviewed, along with a detailed summary of their statements; ◦ A timeline of events;
 - A summary of prior relevant incidents, reported or unreported; and
 - The basis for the decision and final resolution of the complaint, together with any corrective action(s).
- Keep the written documentation and associated documents in a secure and confidential location.
- Promptly notify the individual who reported and the individual(s) about whom the complaint was made of the final determination and implement any corrective actions identified in the written document.
- Inform the individual who reported of the right to file a complaint or charge externally as outlined in the next section.

Legal Protections And External Remedies

Sexual harassment is not only prohibited by RE/MAX Town & Country but is also prohibited by state, federal, and, where applicable, local law.

Aside from the internal process at RE/MAX Town & Country, employees may also choose to pursue legal remedies with the following governmental entities. While a private attorney is not required to file a complaint with a governmental agency, you may seek the legal advice of an attorney.

In addition to those outlined below, employees in certain industries may have additional legal protections.

State Human Rights Law (HRL)

The Human Rights Law (HRL), codified as N.Y. Executive Law, art. 15, § 290 et seq., applies to all employers in New York State with regard to sexual harassment, and protects employees, paid or unpaid interns and non-employees, regardless of immigration status. A complaint alleging violation of the Human Rights Law may be filed either with the Division of Human Rights (DHR) or in New York State Supreme Court.

Complaints with DHR may be filed any time **within one year** of the harassment. If an individual did not file at DHR, they can sue directly in state court under the HRL, **within three years** of the alleged sexual harassment. An individual may not file with DHR if they have already filed a HRL complaint in state court.

Complaining internally to RE/MAX Town & Country does not extend your time to file with DHR or in court. The one year or three years is counted from date of the most recent incident of harassment.

You do not need an attorney to file a complaint with DHR, and there is no cost to file with DHR.

DHR will investigate your complaint and determine whether there is probable cause to believe that sexual harassment has occurred. Probable cause cases are forwarded to a public hearing before an administrative law judge. If sexual harassment is found after a hearing, DHR has the power to award relief, which varies but may include requiring your employer to take action to stop the harassment, or redress the damage caused, including paying of monetary damages, attorney's fees and civil fines.

DHR's main office contact information is: NYS Division of Human Rights, One Fordham Plaza, Fourth Floor, Bronx, New York 10458. You may call (718) 741-8400 or visit: www.dhr.ny.gov.

Contact DHR at (888) 392-3644 or visit dhr.ny.gov/complaint for more information about filing a complaint. The website has a complaint form that can be downloaded, filled out, notarized and mailed to DHR. The website also contains contact information for DHR's regional offices across New York State.

Civil Rights Act of 1964

The United States Equal Employment Opportunity Commission (EEOC) enforces federal anti-discrimination laws, including Title VII of the 1964 federal Civil Rights Act (codified as 42 U.S.C. § 2000e et seq.). An individual can file a complaint with the EEOC anytime within 300 days from the harassment. There is no cost to file a complaint with the EEOC. The EEOC will investigate the complaint, and determine whether there is reasonable cause to believe that discrimination has occurred, at which point the EEOC will issue a Right to Sue letter permitting the individual to file a complaint in federal court.

The EEOC does not hold hearings or award relief, but may take other action including pursuing cases in federal court on behalf of complaining parties. Federal courts may award remedies if discrimination is found to have occurred. In general, private employers must have at least 15 employees to come within the jurisdiction of the EEOC.

An employee alleging discrimination at work can file a "Charge of Discrimination." The EEOC has district, area, and field offices where complaints can be filed. Contact the EEOC by calling 1-800-669-4000 (TTY: 1-800-669-6820), visiting their website at www.eeoc.gov or via email at info@eeoc.gov.

If an individual filed an administrative complaint with DHR, DHR will file the complaint with the EEOC to preserve the right to proceed in federal court.

Local Protections

Many localities enforce laws protecting individuals from sexual harassment and discrimination. An individual should contact the county, city or town in which they live to find out if such a law exists. For example, employees who work in New York City may file complaints of sexual harassment with the New York City Commission on Human Rights. Contact their main office at Law Enforcement Bureau of the NYC Commission on Human Rights, 40 Rector Street, 10th Floor, New York, New York; call 311 or (212) 306-7450; or visit www.nyc.gov/html/cchr/html/home/home.shtml.

Contact the Local Police Department

If the harassment involves unwanted physical touching, coerced physical confinement or coerced sex acts, the conduct may constitute a crime. Contact the local police department.

Addendum B: Sexual Harassment Complaint Form

RE/MAX Town & Country

New York State Labor Law requires all employers to adopt a sexual harassment prevention policy that includes a complaint form to report alleged incidents of sexual harassment.

If you believe that you have been subjected to sexual harassment, you are encouraged to complete this form and submit it to Diane Butterman, email: dbuttermax@gmail.com. You will not be retaliated against for filing a complaint.

If you are more comfortable reporting verbally or in another manner, your employer should complete this form, provide you with a copy and follow its sexual harassment prevention policy by investigating the claims as outlined at the end of this form.

For additional resources, visit: ny.gov/programs/combating-sexual-harassment-workplace

COMPLAINANT INFORMATION

Name:

Work Address: Work Phone:

Job Title: Email:

Select Preferred Communication Method: Email Phone In person

SUPERVISORY INFORMATION

Immediate Supervisor's Name:

Title:

Work Phone: Work Address:

COMPLAINT INFORMATION

1. Your complaint of Sexual Harassment is made about:

Name: Title:

Work Address: Work Phone:

Relationship to you: Supervisor Subordinate Co-Worker Other

2. Please describe what happened and how it is affecting you and your work. Please use additional sheets of paper if necessary and attach any relevant documents or evidence.

3. Date(s) sexual harassment occurred:

Is the sexual harassment continuing? Yes No

4. Please list the name and contact information of any witnesses or individuals who may have information related to your complaint:

The last question is optional, but may help the investigation.

5. Have you previously complained or provided information (verbal or written) about related incidents? If yes, when and to whom did you complain or provide information?

If you have retained legal counsel and would like us to work with them, please provide their contact information.

Signature: _____ Date: _____

Instructions for Employers

If you receive a complaint about alleged sexual harassment, follow your sexual harassment prevention policy.

An investigation involves:

- Speaking with the employee
- Speaking with the alleged harasser
- Interviewing witnesses
- Collecting and reviewing any related documents

While the process may vary from case to case, all allegations should be investigated promptly and resolved as quickly as possible. The investigation should be kept confidential to the extent possible.

Document the findings of the investigation and basis for your decision along with any corrective actions taken and notify the employee and the individual(s) against whom the complaint was made. This may be done via email.

Addendum C: Success Checklist

[Click Here for a Fillable Form](#)

"Unlocking Success in 90 Days: Your Journey Begins Now!"

Name

Name

Agent Set-Up

- Filled out my Welcome Information
- Received and completed my paperwork via BackOffice

Choose my Realtor Board

Paperwork sent to

- OneKey
- SmartMLS
- SentiLock
- Supra

Added to Systems

- Received and chose remax.net email
Received an email from northeastregion.remax.com@mail.bbsv4.net. You will choose your official RE/MAX email. This is your userid to remax.net. Write it down here
- Received Invitation to be Setup on BackOffice
Received an email from dbuttermax@gmail.com with setup instructions.
- Added to our office google group.
You have been added with the email you supplied in your first Welcome to RE/MAX TNC email. If you want to email the entire office use: **tnc-agents@googlegroups.com**

Office Setup

Copier/Printer

Your copier code is 0 + "the last 4 digits of your cell number"

- Printed a test page
- Emailed a document to myself

Mailbox

Your mailbox is a penda flex folder near the kitchen.

- Received My First Piece of Mail!

Get Known

Create Your Email Signature

Your email signature is your first form of branding. To conform with DOS/DCP standards it should look like this (this is your Bold Trail website, and gmail)

Diane Butterman
RE/MAX Town & Country
Real Estate Salesperson
584 Route 9, Suite 106
Fishkill, NY 12524
C: 914-xxx-xxx
O: 845-765-6128
www.dianebutterman.remax.com

Record Your Vmail

Your voicemail needs to say you are a real estate salesperson (broker) with RE/MAX Town & Country. Example: Hi, this is Diane Butterman, Real Estate Salesperson with RE/MAX Town & Country. I'm sorry I was unable.....

Recorded Your Intro Video

A **real estate agent intro video** serves as a powerful marketing tool to establish credibility, build trust, and connect with potential clients. A great intro video makes you **memorable** and helps turn online leads into real conversations.

Update Your Profiles

Make sure when consumers find online your information is accurate. This is a [great reference manual](#) for you to use

Profiles

	Completed	Created
MLS	<input type="radio"/>	<input type="radio"/>
realtor.com	<input type="radio"/>	<input type="radio"/>
Zillow	<input type="radio"/>	<input type="radio"/>
Trulia	<input type="radio"/>	<input type="radio"/>
homes.com	<input type="radio"/>	<input type="radio"/>
Google	<input type="radio"/>	<input type="radio"/>
LinkedIn	<input type="radio"/>	<input type="radio"/>
Facebook	<input type="radio"/>	<input type="radio"/>
Instagram	<input type="radio"/>	<input type="radio"/>
TikTok	<input type="radio"/>	<input type="radio"/>
Pinterest	<input type="radio"/>	<input type="radio"/>
YouTube	<input type="radio"/>	<input type="radio"/>

Preparing for my business to grow

tncresources.com

Check out and register on the resource site. This is a valuable internal source for your use. From the resource manual, training calendar, office forms and manuals it is a one stop shop.

Sent headshot and photo for business cards

You need your business cards for networking. They enhance your credibility and professionalism. They are a marketing tool. Remember for every card you give out be sure to get contact information back!

Created a .csv file of contacts

For every 200 contacts that you systematically and consistently touch you should expect 2 pieces of business. Create your file and let's add them to your CRM.

Created my 1-3-5

A 1-3-5 is a GPS - a map of how you are going to grow your business. We start learning about the 1-3-5 in AMP session 1

Looked at the training calendar

The training calendar is found on tncresources.com. Register for the classes you would like to attend. Peruse our [Course Catalog](#) to decide what courses you would like to attend. Don't see it scheduled? Ask when it will offered next.

Create Your Bio

A great biography will attract consumers to want to work with you. Try chatgpt to get a well written, unique biography

Bio Added

Completed

remax.net profile

Bold Trail

MLS

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tncresources.com

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Attend 3 Office Meetings

Check the [Training Calendar](#) to see when the next monthly office meeting is scheduled. They are usually held on the third Monday at 1:00 in the Fishkill office. There is usually a zoom link available.

Ask an agent if you can shadow them for a day.

Shadowing a agent will give you hands-on experience and insight by observing a seasoned professional in their daily activities

Activity

	Completed
Open House	<input type="radio"/>
Buyer Consultation	<input type="radio"/>
Property Showing	<input type="radio"/>
Listing Presentation	<input type="radio"/>
Inspection	<input type="radio"/>

Social Media

Create Social Media Profiles

A strong social media presence helps you establish your brand, "YOURSELF", increases your visibility to a wider audience allowing you to interact directly with clients and foster new relationships.

Platforms

	Completed
Facebook	<input type="radio"/>
Instagram	<input type="radio"/>
TikTok	<input type="radio"/>
Google Business Page	<input type="radio"/>
Review TNC Fishkill Google Page	<input type="radio"/>
Email Howard & Dom & Leadership for Review(s)	<input type="radio"/>

Create Posts

	Posted	Replied to Likes	Interacted with Comments	Friended 5 new people a day	Liked 5 posts a day
Introduction/Bio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Commercial	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Poll	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Just Listed/Just Sold	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Profiles

remax.net

Updated my remax.net profile

Your profile on remax.net is where your branding starts and has several functions. It send all your contact info and photo to other RE/MAX Tech tools and resources.

Updated Job Title

General Info: Edit - Name & Title and scroll to Job Title. Add either Real Estate Salesperson or Associate Real Estate Broker

Web & Social Media Sites

Add your social profiles to your profile and website home page. Adding your accounts allows consumers to find you on remax.com, your office site and agent site to learn more about yuu.

Photo

Your professional photo is fed to your personal website as well as remax.com and the office site. Having a photo on this sites adds to your credibility and your professionalism.

Professional Details

Update your specialties and any designations you have earned throughout your career. Choose as many specialties as you wish - these will be used for referrals. You can add 5 "Additional Service Areas". It's best to make them broad - look for the counties you want to work in. You don't need to add prior affiliation as it is used for internal use only.

Personal Details

Fill in something in all the categories. These items will attract agents and consumers to use you for their business or referrals. The most important is your BIO - boost yourself in SEO algorithms.

MLS Affilitaion

Once you have received your MLS id add it to your profile. Click + Add and enter your id and click save. (Add your MLS in 2 formats: #####, H#####) This will transfer to BoldTrail. This is critical to ensure your listings and leads flow through the system. It also enables all MLS listings to be shown on your website as well as your personal listings. All your listing marketing material is dependent on this MLS ID.

Bold Trail

Platform: MAX/Tech powered by BoldTrail

Select My Profile under your name in the top right corner and then select the dark blue button Edit Profile

Create Your Signature

Use the signature your created above and turn on "Include signature on all outgoing email"

Appointment Availability

Your appointment availability looks like you are open 24 hours. Don't worry about that. Leave it that way. That is the best setting for Google SEO

Attend Bold Trail classes

Check on training calendar for in house Bold Trail training and RE/MAX Support Training.

Opt-In for Lead Concierge

Search Marketplace from Top Search Bar: Select MaxTech Lead Concierge (Learn More). Scroll down and opt-in. This is a vetted lead program with a 30% referral back to RE/MAX when you close the deal.

Support Software

BackOffice

Be on the lookout for an invitation to set up your office BackOffice account.

BackOffice is the system we use to keep all of your real estate transactions, paperwork, and commissions organized in one place. It makes it easier for you to upload documents, track deals, and get paid quickly and accurately.

Click [here](#) for info on How to Navigate BackOffice before formal training

Explore RE/MAX Luxury Collection

tncresources.com (File Share, Luxury Collection)

Watched Luxury Overview Presentation

[Luxury Overview Presentation](#)

RE/MAX Global Referrals Platform

Activate your profile by visiting remaxglobalreferrals.com

Download the Mobile App

RE/MAX Global Referrals on the App Store or Google Play

Set up your preferences in Global Agent Profile

Reviewed Information about real estate practices around the world

Real estate practices vary from country to country. It is important to be educated in the practices in those countries so you can best prepare your clients for the process.

RE/MAX Apps

RE/MAX Hustle

Customize a Commercial

Post your Commercial on Social Media

Explore and send a digital welcome mat

Create a "Highlight Your Skills" Video

Post on Social Media or Email

Create a Hustlegraphic

URL Shortner

Watch the lesson on the URL Shortener on REMAX University. (You will have to sign into remax.net)

[Using the rem.ax URL Shortener](#)

Acknowledgement Page

I acknowledge that I have reviewed the RE/MAX Town & Country Resource Manual and the information contained within it. I understand that I can always access the most up-to-date version on the homepage of tnsresources.com.