Agent Office/Brokerage Transfer Resources

- [ ] **Listing Transfer Form** (transfer any MLS listings to new broker)

Per TREC rules, your listings in MLS will not automatically transfer with you when you transfer to a new brokerage. You will need to complete a Listing Transfer Request Form, where your previous broker will sign off to release the listings, and your new broker will sign off to receive the listings. To locate this form, navigate to mymetrotex.com and click on "Manage My Membership" then on "Request Forms" to find the Listing Transfer Form.

- [ ] **Update Contact Information in zipForm Plus**

The zipForm Plus transaction management tool will not automatically update with your new information when you change brokerages. You can login to zipForm Plus, click on the Profile and Settings in the top right-hand corner, and click the "Offices" tab to update your office information. You may also need to update your email signature here. The new, updated information will only populate on new transactions – prior transactions will not be changed.

- [ ] **Update Email Signature in NTREIS MLS**

The email signature that appears at the bottom of any email communications sent out of Matrix MLS to your clients will not automatically update when you change offices. Make sure to login to Matrix, click on "My Matrix → My Information → Email Signature" to update your email signature.

- [ ] **Update Agent Branding in MLS-Touch**

The MLS Touch mobile app has a branding center that controls the branding that will display on your client's OneHome portal when you send them listings from MLS. To update this branding, download the MLS Touch mobile app for free in the app store or google play store. Sign in to the app, and then click the 'More' button in the bottom right corner. You will see a 'Brand & Share' center where you can update your agent branding.

- [ ] **Instanet Transaction Desk Transactions**

When an agent moves from one office to another, their Instanet Transaction Desk transactions will not move with them. Instead, these transactions stay with their previous broker and are re-assigned to the broker or office manager in that office. An email is sent to both the agent and the user the transactions were assigned to. Agents can reach out to their previous broker, who can transfer those transactions to the agent in their new office. Brokers can access and transfer these transactions under "Broker Tools" then "Transaction Transfer" in Instanet.

- [ ] **Transfer Fee**

The MetroTex Member Services team requires a $10 transfer fee when agents transfer between offices.

- [ ] **Update Contact Information**

Often, when an agent moves to a new office, they get a new email address or phone number. Take a moment to check your agent information in Matrix and update any email addresses or phone numbers that might have changed.

- [ ] **Update "Office Supervisor" on MLS Listings**

The "Office Supervisor" field on MLS listings is manually input by the listing agent and will need to be updated to their new office supervisor when they change offices. To edit this information, go into edit your listing, and navigate to the Agent/Office tab. Type in the new supervisor's name in the List Office Supervisor field, and click 'refresh' next to the field to fill the new information in on your listings.