

# Checklist for Switching Real Estate Brokerages



## Step 1. Read your Current Independent Contract Agreement

- Read your current Independent contractor agreement
- Browse the rest of this checklist and cross off anything you cannot take with you

## Step 2. Preparing to leave

- If you've gotten better looking, get a new headshot
- Get your own website/email domain and set up your email
- Start forwarding your emails to your new email address
- Download all data from your CRM (if possible)
- Download contract templates (if possible)
- Download email campaigns (if possible)
- Change calendars (If necessary)
- Office space (If necessary)

## Step 3. Set up everything in your new brokerage

- Complete onboarding with your new brokerage
- Listing signs** - Redesign & order new
- Email signature** - Update branding
- CRM** - Upload data
- Contract System** - Create new templates (Dotloop/Docusign)
- Drip Campaigns** - Rebuild in your new CRM
- Voicemail Change** - "Hey, this is \_\_\_\_\_ w/ Five Pillars at eXp Realty. I'm unable to take your call right now, but if you leave your name, number, and a brief message I'll get back to you as quickly as possible. For a faster response, feel free to shoot me a text. Thank you, have a great day!"
- Business cards** - Design & order
- Mailers** - Design & order
- Facebook** - Update branding
- LinkedIn** - Update branding
- Instagram** - Update branding
- Snapchat** - Update branding
- Tiktok** - Update branding
- Pinterest** - Update branding
- Social Media Templates** - Update branding



**FIVE PILLARS  
BE MORE**

- Buyer Info Packets** - Update branding
- Listing Info Packets** - Update branding
- Email Blast** - Announce switch
- Social Media Blast** - Announce switch
- Website** - Update branding
- Listing agreements** - Resign new agreements with active listings (If possible)
- Agency agreements** - Resign new with active buyers (If possible)
- Contact Card** - Set up your in your phone so you can share it with people when they need your number (Text it to them so you have their number and can save them)

If I'm missing something, text me @ 605-999-6345 and I'll happily update this!