

**REFERRAL INFORMATION FORM**

**SECTION 1 - RECEIVING OFFICE** **SENDING OFFICE**

To: \_\_\_\_\_  
 Firm Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Business Phone: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Fax Phone: \_\_\_\_\_

From: \_\_\_\_\_  
 Firm Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Business Phone: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Fax Phone: \_\_\_\_\_

**SECTION 2 - SELLER INFORMATION**

Seller Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Business Phone: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Fax Phone: \_\_\_\_\_

When to make initial contact: \_\_\_\_\_  
 Property Address to be listed: \_\_\_\_\_  
 \_\_\_\_\_  
 Additional Helpful Information: \_\_\_\_\_  
 \_\_\_\_\_

**SECTION 3 - BUYER INFORMATION**

Buyer Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Fax Phone: \_\_\_\_\_  
 Preferred Location: \_\_\_\_\_  
 Size and Type of Home Desired: \_\_\_\_\_  
 \_\_\_\_\_  
 Price Range: \$ \_\_\_\_\_  
 Number in Family: \_\_\_\_\_ Adults \_\_\_\_\_ Children  
 Children Ages: \_\_\_\_\_

New Employer: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Position and Approx. Salary: \_\_\_\_\_  
 Must home be sold first? \_\_\_\_\_  
 Company Buyout? \_\_\_\_\_  
 Cash Available for Purchase & Closing Costs: \_\_\_\_\_  
 Contact Buyer at this number first: \_\_\_\_\_  
 by this date: \_\_\_\_\_  
 Expected Arrival Date: \_\_\_\_\_ Moving Date: \_\_\_\_\_  
 Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**SECTION 4 - REALTOR'S ACCEPTANCE OF REFERRAL**

Prospect's Name: \_\_\_\_\_  
 Date Contacted: \_\_\_\_\_  
 Date of First Appointment: \_\_\_\_\_

Comment: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**WE ACCEPT THIS REFERRAL, AND WHEN THE SALE IS CONSUMMATED, WE AGREE TO SEND \_\_\_\_\_% (OF THE GROSS COMMISSION) REFERRAL FEE. WE WILL ENCLOSE DETAILS OF THE SALE WITH THE CHECK**

\_\_\_\_\_  
 Receiving Sales Associate Signature Date

\_\_\_\_\_  
 Receiving Broker's Signature Date

\_\_\_\_\_  
 KWGC Broker's Signature Date

## **REFERRAL INFORMATION FORM**

### **1. Sending Agent Procedures**

- a. Contact the chosen agent to see if he or she can provide the service in which you are interested. If you do not know an agent in that Market Center, it may be necessary to speak with the Team Leader to seek assistance in selecting a receiving agent. Be sure that the agent is completely familiar with the area the customer has indicated or where you have a potential listing.
- b. Confirm the referral fee. The customary referral fee amongst agents in KELLER WILLIAMS Realty Gold Coast is 20% of the side of the transaction. (20% of the gross listing or selling side of the commission)
- c. Complete your portion of the referral form and send two copies to the agent.
- d. Give a copy to your Team Leader.
- e. Follow-up with the customer to make sure the agent has contacted him/her and is satisfied with the receiving agent.

### **2. Receiving Agent Procedures**

- a. Upon receiving the referral form, contact the customer.
- b. Complete your portion of the referral form on each copy. Return one copy to the sending agent and retain one copy for your records. Be sure to include a copy of the contract pending file when a sale is consummated.
- c. Give a copy to your Team Leader.

### **3. Completing the KELLER WILLIAMS Realty Gold Coast Referral Information Form**

**SECTION 1 - RECEIVING OFFICE/SENDING OFFICE:** This identifies the receiving/sending agents. This portion should be completed by the sending agent.

**SECTION 2 - SELLER INFORMATION:** This is used when sending out a listing referral. This portion should be completed by the sending agent.

**SECTION 3 - BUYER INFORMATION:** This contains data about the customer. It should be completed by the sending agent.

**SECTION 4 - REALTOR'S ACCEPTANCE OF REFERRAL:** This should be completed by the receiving agent and returned to the sending agent.