



Agent Orientation Packet

FOR SALE





Welcome to the team!

On behalf of the entire Dalton Wade Real Estate Group team, we are thrilled to extend a warm welcome to you! Congratulations on joining our dynamic family of real estate professionals.

Your journey with us is not just a job; it's an opportunity to be part of a community that values your unique skills and perspectives. As you embark on this exciting chapter, know that you have the support of a dedicated team and a wealth of resources to help you succeed.

The real estate landscape is ever-evolving, and we believe in equipping our agents with the knowledge, tools, and opportunities they need to thrive. Our comprehensive onboarding program and mentorship initiatives are designed to ensure a smooth transition and empower you to reach your full potential.

Feel free to reach out to our team, ask questions and immerse yourself in the vibrant culture that defines Dalton Wade Real Estate Group. Your success is our success, and together, we'll achieve remarkable results.

Once again, welcome to the Dalton Wade family! We look forward to witnessing your growth and contributions as an integral part of our team.

Phillip Wade

CEO and Managing Broker in Florida

Kevin Gioia

Managing Broker in All Other States



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This PDF is interactive, enabling you to effortlessly access crucial information, emails, and website links. Keep an eye out for hyperlinks scattered throughout the document, including rectangle buttons or embedded links within the text.





ABOUT DALTON WADE

Dalton Wade Real Estate Group began its journey in sunny Florida back in 2015 with a big vision. Starting small, we were just a handful of agents, all sharing the dream of creating a unique brokerage. Our goal was simple – to build a place where agents could work smoothly from home and receive excellent training and support, all without the hefty desk fees and high commission splits that larger real estate firms often have.

Fast forward to today and Dalton Wade has grown into a strong presence in Florida, Georgia, North Carolina, and Alabama. We now have a network of over 1,600 agents, and we're committed to maintaining a supportive real estate community. But we're not stopping here; we have plans to expand into more states, like Texas and Tennessee, taking Dalton Wade to even greater heights and opportunities. As we grow, our core principles of putting agents first, embracing innovation, and striving for excellence continue to be the foundation of our success. In our journey ahead, Dalton Wade Real Estate Group remains focused on empowering agents and making a positive impact in the communities we serve.

DALTON WADE BY THE NUMBERS

1,600	Agents
\$2.25B	2023 Transaction Value
8	Years In Business
6	States We Are Licensed In

**Make sure to download the latest copy
of our Office Manual and Policies!**

[DOWNLOAD HERE!](#)

MEET THE TEAM



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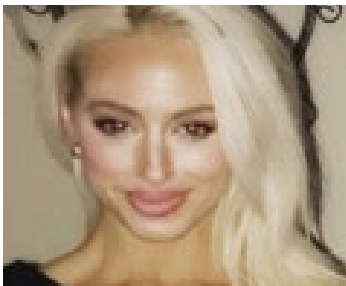
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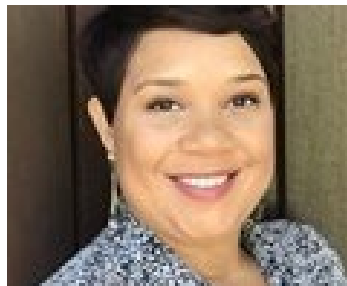
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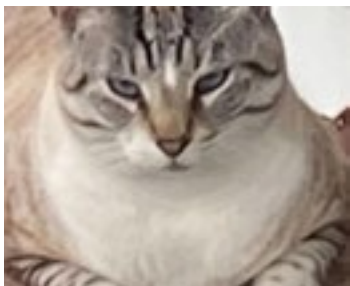
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Support Specialist



**At Dalton Wade, we aim to
equip our agents with the
*tools for success.***

TRAINING, SUPPORT & DEVELOPMENT

Dalton Wade Real Estate Group offers a variety of on-demand video training content and live sessions to keep our agents updated on the latest advancements in the real estate industry. Before starting work as a DW Agent, it is essential to finish any MLS/Board Trainings. Dotloop Training is a mandatory course to ensure you learn how to use the compliance system and receive payment at closing. We highly recommend taking all of our training courses, which are outlined below.

View all of our on demand training videos [here](#). | View and register for all of our upcoming live training [here](#).

1. MLS/Board Training:

Please consult your Real Estate Board and MLS to understand their specific requirements for adding/editing listings, and other pertinent tasks. You are responsible for scheduling and completing these trainings directly with your board and MLS. (Your applicable board is in your intro email!)

2. Dotloop Training:

Gain proficiency in using Dotloop, our free contract, electronic signature, and compliance software designed to streamline your transactions and ensure smooth payments at the closing table. Dalton Wade offers comprehensive training for Dotloop through both live sessions and on-demand resources. Register for the next [live class here](#) or view the [recorded session here](#).

OTHER RECOMMENDED TRAINING COURSES

1. Brand New Agent Training:

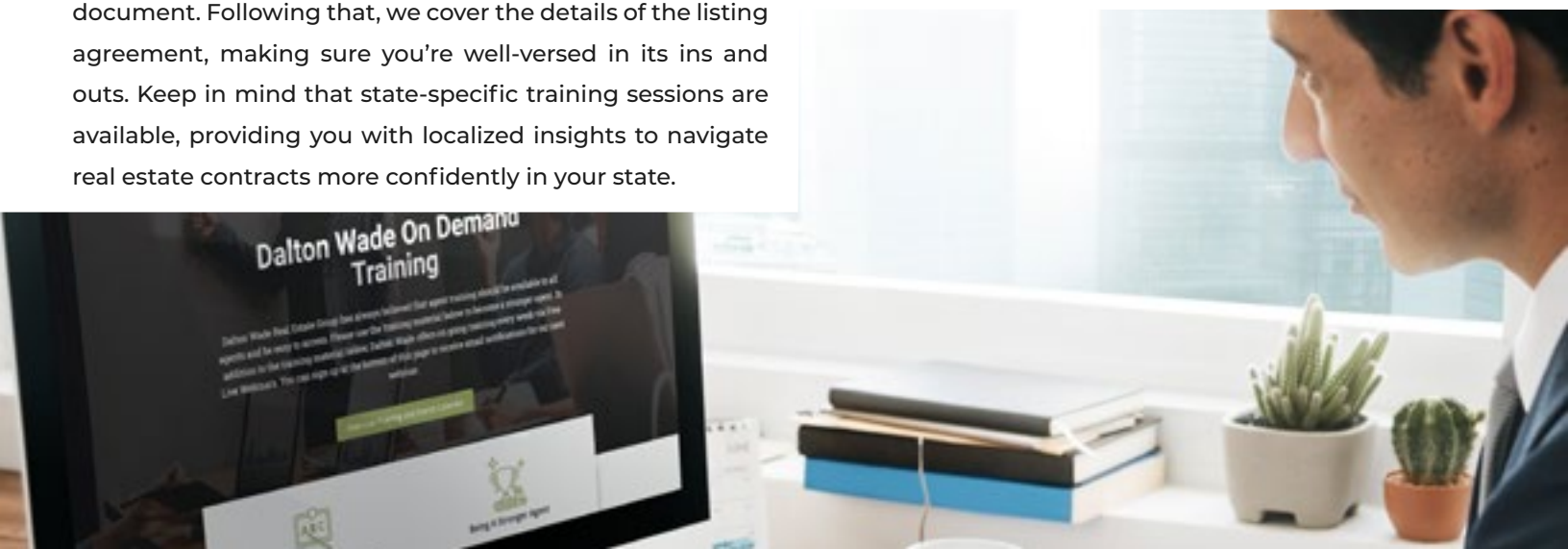
Are you a recent graduate of real estate school, eager to make a mark in the industry? This training program, designed specifically for brand new agents, is tailored to your needs! We encourage you to participate in this training shortly after joining the brokerage to ensure you're well-equipped for success and have a comprehensive understanding of effective business prospecting techniques.

2. State Contract & State Listing Training:

We break down the purchase contract section by section, ensuring you gain a solid understanding of this essential document. Following that, we cover the details of the listing agreement, making sure you're well-versed in its ins and outs. Keep in mind that state-specific training sessions are available, providing you with localized insights to navigate real estate contracts more confidently in your state.

3. Lead Conversion Training:

Learn how to successfully convert leads into closings, focusing on both buyer and seller leads. For buyer leads, understand the significance of effective calls, scripting, objection handling, following up using Boomtown, and the steps for scheduling showings and making offers. Dive into seller leads by mastering impactful calls, diligent follow-ups, and the entire process of scheduling, researching, and conducting list appointments to secure valuable listings. This training provides you with comprehensive insights and practical skills and to turning leads into transactions and then closings.



4. Boomtown Training:

Get acquainted with our CRM (customer relationship management system) and the backend login for your Dalton Wade agent website. Learn how to efficiently handle leads and enhance your path to successful closings using this tool. It equips you with essential insights and practical skills, ensuring you make the most of our CRM to maximize your closing potential. If you're part of the Lead Program, this training is a requirement!

5. Open House Training

Discover the art of hosting a successful open house with our comprehensive on-demand training. We'll guide you through every step, from the initial setup to the essential materials you should bring, and finally, the breakdown process. Learn effective communication strategies and what to say and do when interacting with potential customers during the open house. Our training doesn't stop there – we'll also provide insights into post-event follow-up techniques to solidify connections and increase your chances of turning prospects into clients. This easy-to-follow on-demand course ensures you're well-prepared and confident in making the most out of your open house opportunities.

6. Paradym (Social Media) Training

This training is highly recommended for all members of our Lead Program. Ensure your social media is on point with Paradym! Paradym simplifies real estate social media management by automatically handling your posts. They create and schedule content for popular platforms like Facebook, Instagram, YouTube, and Twitter. The training covers everything you need to set up your account. Once set up, it runs on autopilot, saving you time and effort while maintaining a robust online presence.

7. Turner Prospector Training

Learn about the Turner Prospector, a specialized tool for Dalton Wade agents. Utilize precision geo-targeting to effortlessly pinpoint soon-to-list sellers, gaining a competitive edge in real estate. This accessible tool is part of the Lead Program, transforming the way you navigate client search and lead generation nationwide.

MENTORSHIP PROGRAM

If you're a newly licensed agent feeling a bit overwhelmed, Dalton Wade has the perfect solution for you – our incredible Mentorship Program. As part of this initiative, you'll be paired with a seasoned agent for your first three transactions. Your mentor will be there to offer guidance, share valuable insights, and help you evolve into a more proficient real estate agent. Curious to learn more about this fantastic program and find the ideal mentor for you? Click below to discover additional details and get started on your mentorship journey.

LEARN MORE

DW AGENT SUPPORT

At Dalton Wade, our commitment to supporting our agents is at the core of our values. We offer a comprehensive support system, including a seven-day-a-week support phone line at 727-914-9174, a dedicated support email address at support@daltonwade.com, and access to our [Knowledge Base](#) with a ticketing system, ensuring assistance is available whenever you need it. The Knowledge Base is an excellent resource for valuable information and serves as a helpful starting point to find answers, especially outside regular support hours.

Support Hours:

Monday through Friday: 9:00 a.m. to 7:00 p.m. EST
Saturday & Sunday: 12:00 p.m. to 5:00 p.m. EST

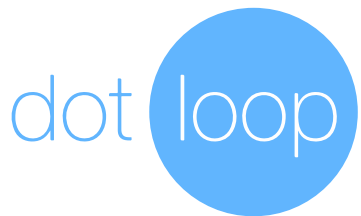
TO DO LIST

In order to submit a ticket on the Knowledge Base website, you will first need to [sign up here](#). Please note, you will receive a separate email after signing up with an email inviting you to create a password.

TECHNOLOGY & TOOLS

BoomTown!

Our existing agent CRM and website are powered by Boomtown. Boomtown offers an agent subdomain for each agent, allowing you to customize your home page. The CRM (Customer Relationship Management system) provides features like sending property alerts, implementing smart drip campaigns, and conducting bulk texting and email outreach to your leads. With this lead management tool, you'll receive instant notifications for new leads and responses once you activate text notifications.



Dotloop is the backbone of our compliance system at Dalton Wade, taking care of all contract paperwork and facilitating seamless electronic signatures. We prioritize Dotloop training as a mandatory requirement for all our agents. This ensures not only compliance but also proficiency, as mastering this vital tool is essential for the smooth execution of transactions and, ultimately, getting you paid.



TO DO LIST

Send Your Photo/Bio to support@daltonwade.com, we will add these your site, which is powered by Boomtown, and make you visible on the main website: www.daltonwade.com.

TRAINING

Training for BoomTown can be found [here](#).

LOGGING INTO DOTLOOP

You will receive a separate email invite to set up your password. Your login email will be the email address you used when you joined Dalton Wade.

DOTLOOP TRAINING

Click [here](#) for Listing-List Side Residential Training.

Click [here](#) for Offer-Buy Side Residential Training.



[Paradym](#) is your go-to marketing companion, and is available to you if you are on the Lead Program at Dalton Wade. It simplifies your real estate marketing with features like a dedicated listing website, automated flyer creation, and customizable digital tours. Push your listings effortlessly to your social media channels along with blog content carefully selected by Paradym's team, ensuring you and your channels stay constantly visible to your network. Elevate your marketing strategy with Paradym's user-friendly platform.



[The Turner Prospector](#) is an invaluable tool brought to you by Dalton Wade's Florida Title Company, [Turner Title](#), and available for use in every state. This versatile resource empowers agents with precise geo-targeting capabilities, revolutionizing client search strategies. Elevate your real estate endeavors by effortlessly identifying motivated sellers in your market with the Turner Prospector.



Up your game with the Dalton
Wade Lead Program!

LEAD PROGRAMS

If you're subscribed to the Business Builder or No Monthly Fee plans, you're automatically enrolled in the DW Lead Program, which offers various advantages not available with the Starter Plan. Explore the details below for a glimpse into these fantastic lead programs! **It's important to note that for any lead programs that involve referral fees (DW or others), these fees are applicable on repeat business for up to two years from the receipt of the lead.**



Website Leads

There are two required training courses you need to attend or view before you can be signed up for these leads. First, you must attend the [Boomtown](#) and the [Lead Conversion](#) trainings. Next, please contact Cheryl at cheryl@daltonwade.com to inform her you are ready to be placed onto this lead program. Keep in mind there's a 30-35% Referral Fee for up to 2 years on repeats. After getting a confirmation email, download the BOOMTOWN NOW App, turn on notifications, and make sure your notification sound is on.

These leads check out home photos on our site, and some might take longer to decide on an agent. Some leads are automatically transferred to you, while others require a quick click to win. After securing a lead in your Boomtown account, call them as soon as possible and stay in touch to build a connection. If you find yourself unable to assist a lead, kindly transfer it back to the "Dalton Wade Client Care Team." This ensures the lead can be reassigned to another agent, considering that acquiring and managing these leads involves costs.



Just as the Website Leads, we require [Boomtown](#) and the [Lead Conversion](#) training to be completed before you can begin Zillow Leads. Next, please contact Mike at mike@daltonwade.com to inform him you are ready to be placed onto this lead program. Please note that this is the only program with an extra cost – a \$333 monthly fee along with a 20% referral fee.

Once you sign up, you'll work with our DW Zillow representative to pick an available zip code, and after payment, you'll have access to exclusive Live Connection Calls and Nurture Leads through text/email. It's important to promptly answer live calls, address nurture drop leads, and consistently follow up in both Boomtown and the Zillow App. To keep getting leads, you need to achieve and maintain Best of Zillow status. This involves a 60% or higher answer rate, scheduling showings on the first call, weekly lead updates in the Zillow App, and thorough updates when you close a deal. Remember, Zillow will stop sending you leads if you're not responsive, and there's no option to pause the service. Referral fees apply to repeat business with a lead for up to 2 years from lead receipt.



[Paradym](#) is a great tool for real estate agents, making it easy to boost your online presence. It has simple features for creating engaging content like flyers, virtual tours, and slideshows, making your property listings stand out. The platform's automation makes marketing more efficient, helping you connect with potential buyers. Once your account is set up, Paradym takes care of posting on your social channels automatically. It can share blogs, broker content, and even listings from other Dalton Wade agents, along with tours of the homes you're selling. Each tour gets its webpage, making it easier to capture leads. Sign up for Paradym training to learn how to automate your social media effortlessly.

GAIN ACCESS

Check your email for logging into your account. Still can't gain access for any reason? Email Cheryl at Cheryl@daltonwade.com for help!



Both OpCity (OC) and PrimeStreet* are click-to-claim lead programs with similar processes. After joining the Lead Program, follow the email instructions to complete your sign-up. Set your lead criteria by specifying that you're an "experienced agent" and willing to collaborate with OC lender and title partners. Opt for lenient criteria, like no minimum price and a wide map area, to increase lead chances. Claim leads promptly, as it's competitive; never skip clicking "claim" to maintain future allocations. Successfully claimed leads are transferred live over the phone. For a steady lead flow, update leads in each app every 7 days. If OpCity is full with a waitlist, contact us for potential workarounds. OpCity has a 30-38% referral fee for up to 2 years on repeat business, and PrimeStreet has a 35% referral fee for up to 2 years on repeat business. Note about PrimeStreet: You must have your real estate license for at least six months in order to gain access to this program!

GAIN ACCESS

Check your email for invitation to join both programs! OpCity will only send an invite if you have not previously logged in before. You must accept invite within 4 weeks of receiving! For PrimeStreet: You must have your real estate license for at least six months in order to gain access to this program!

IMPORTANT NOTE:

If you do not complete your sign up via your email invitation & fill out all lead criteria you will get ZERO leads!



REDX* compiles a list of For Sale By Owner (FSBO), expired, and withdrawn listings from various counties, sent out and updated every week. This lead program enables you to initiate cold calls with the leads you choose, but be sure you avoid those on the Do Not Call List. Before reaching out, it's essential to double-check the MLS for any WD-Conditional status, indicating that the list agent may still be owed commission. Once you've made an appointment with the lead, utilize the provided Listing Presentation [here](#) to seal the deal. Should the seller opt to list with you, you can take advantage of the opportunity to list the home with a 0% referral fee, maximizing the benefits derived from this program.

Open House CONNECT

Open House Connect* is your gateway to free leads! Each week, we check in with all Dalton Wade agents (regardless if they are on the Lead Program or not) to see if they have open houses that need hosting. As a lead program user, you receive access to a list of available open houses each week. When you find a home you want to host an open house for, reach out to the listing agent to arrange a date and time for hosting, and then let us know once you've claimed one. Simply host the open house, and start connecting with free buyer leads right away.

GAIN ACCESS TO BOTH LISTS

In order to gain access to the Open House Connect and REDX Lists, click [here](#). Sign in using your email address and the password "DaltonWade". You will only be able to gain access once you are on the Lead Programs.

WANT TO UPGRADE TO OUR LEAD PROGRAM?

Ready to step up to the Business Plan at \$129/month + \$79/transaction? Click [here](#), complete the form, and voila! Our DW team will get the heads up, and you'll soon receive more info via email.

Or perhaps you're keen on our No Monthly Fees Plan? Here's the scoop:

1. Contact [support](#) to let them know you want to upgrade!
2. If you were paying by PayPal, make sure to cancel any automatic payments using [these instructions](#).



MARKETING

**Effective marketing plays a
crucial role in any business,
and this holds true for you
as a real estate agent with
Dalton Wade.**

MARKETING & BRANDING

SET UP YOUR MARKETING MATERIALS

Crafting your marketing materials is a crucial step as you embark on your Dalton Wade journey. Here are a few initial tasks to prioritize, that we will go over on the next few pages:

1. Design and order Dalton Wade business cards and signage.
2. Create new social media accounts or update existing ones to align with Dalton Wade branding.
3. Establish your email signature to represent Dalton Wade.
4. Set up or revise your voicemail on both your cell phone and office lines.



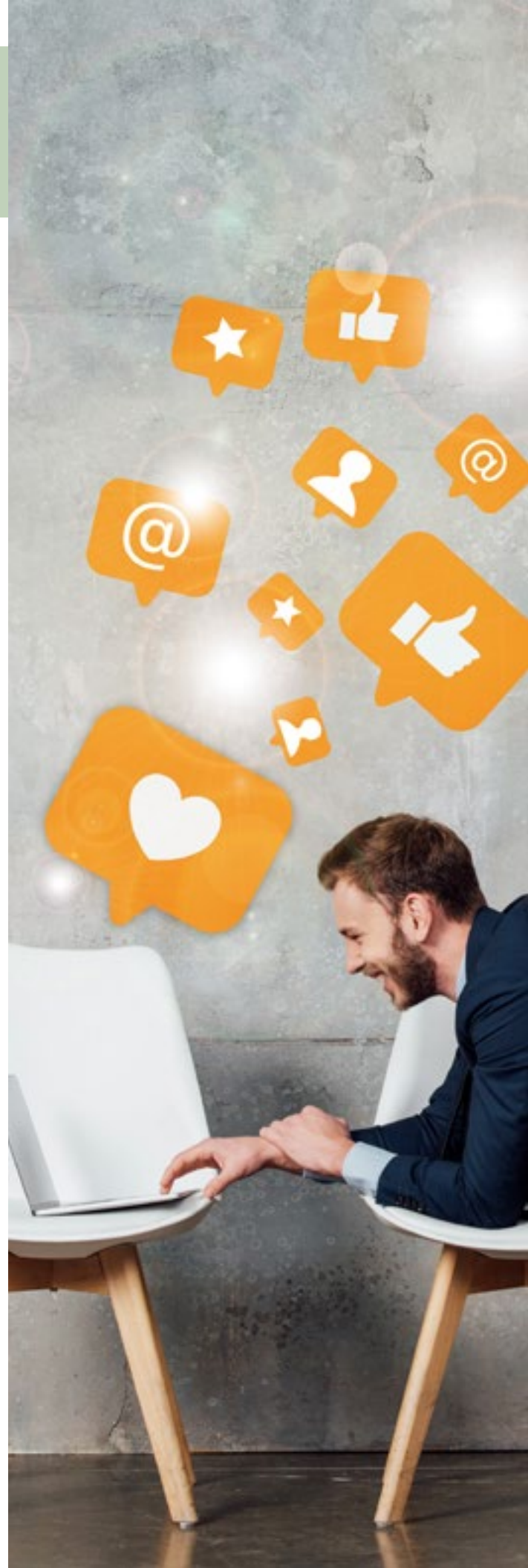
DW LOGO AND BRANDING

We provide a range of marketing materials for all our agents, and while we encourage adherence to our brand guidelines, we also respect the flexibility for agents and teams to brand themselves as they see fit. The Dalton Wade logo and branding guidelines can be downloaded from our website for your convenience.

[DOWNLOAD ASSETS](#)

BUSINESS CARDS & SIGNAGE

Create these using Our DW [Business Card Star](#) or our [Markful Card & Sign](#) Portals. Your login for Business Card Star is your email and the temporary password is "daltonwade". (Or create materials on your own anywhere, just send a proof to support@daltonwade.com for approval before ordering).



SOCIAL MEDIA PROFILES

We advise you to promptly update your online profiles to reflect your new brokerage. This includes platforms such as [Facebook](#), [Instagram](#), [YouTube](#), [Linkedin](#), [Zillow](#), and/or [Realtor.com](#) and updating your [Boomtown subdomain website](#). (You will need to be logged into your Boomtown account to view the article!) Ensuring that your affiliation with Dalton Wade is communicated across all online channels is essential. The way we represent ourselves holds significant influence. Projecting a professional image that emphasizes quality service increases the likelihood of attracting and retaining clients. Seize every simple opportunity to present yourself as the preferred agent that buyers and sellers want to work with through their real estate journey.

FOLLOW US ON SOCIAL MEDIA

You can find Dalton Wade Real Estate Group on various social media platforms, including Facebook, Instagram, Youtube, and LinkedIn. On some of these platforms, we maintain separate accounts—one for consumers (targeting buyers and sellers) and another specifically for our agents. We encourage you to follow and like both for comprehensive updates and insights!

- » [Facebook](#)
- » [LinkedIn](#)
- » [Instagram](#) - Agent [Instagram](#) - Consumer
- » [YouTube](#) - Agent [YouTube](#) - Consumer

Remember to tag us in your posts, especially on Instagram! We make an effort to showcase our agents' homes on our Instagram stories, providing additional exposure to our followers. It's a good idea to inform your leads about our pages, allowing them to explore the homes available for purchase.

JOIN OUR AGENT GROUP

As a Dalton Wade agent, you have exclusive access to our private Dalton Wade Agent group on Facebook. Joining this community is crucial for various reasons. It offers a network of fellow DW agents for sharing listings, seeking recommendations, and reaching out for assistance. Additionally, we use this platform to announce live trainings, provide important updates, and share details on accessing the Open House Connect feature in the lead programs.

JOIN THE GROUP

MARKETING ASSETS

Lack the time to craft marketing materials for your social pages? No problem! We offer several templates that are ready for your use. These marketing materials are completely free and can be customized using Canva. Just sign up for a free account with Canva to begin utilizing them. Easily personalize them by modifying text, fonts, colors, and photos. Be sure to check back regularly for additional templates.

ACCESS THE MATERIALS



LISTING AND BUYERS AGENT PRESENTATIONS

We offer our agents branded PowerPoint presentations. One of these resources we provide is a [Listing Presentation](#), offering you the chance to showcase why you are the best agent to list and sell your client's property. Alternatively, we offer a [Buyers Agent Presentation](#), a game-changer designed to simplify your life and enhance your client roster. Whether you're pitching to your first client or your hundredth, this invaluable resource serves as the go-to toolkit for Dalton Wade agents aiming to attract clients in the home-buying market. Both presentations are available available in PowerPoint and Google Docs.



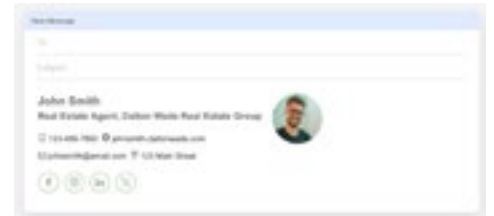
ESTABLISH EMAIL/TEXT SIGNATURE

The way that we represent ourselves has an impact. When we are viewed as a professional who provides quality service, then we are more likely to attract and retain clients. Take advantage of every simple opportunity to represent yourself as the professional that buyers and sellers WANT to have as their agent.

Connecting with clients and presenting yourself as a professional, expert real estate resource who provides great service and is easy to reach, is simple, when you start with the basics.

Keep these fundamentals in mind when approaching signatures:

1. Every time your client receives a message from you, or engages with you, they should know it is you. What does this mean?
 - a. Every email (even replies) should contain contact/brokerage information.
 - b. Every text conversation should identify you. Have you ever received a text from someone and not known who it is from?
 - c. Every time you leave your client a voicemail message, leave your contact info.
 - d. Every time a client or potential client sees your name, it is an opportunity for them to identify you as a real estate professional. You want to be the first, last and best person they think of when it is time to buy, sell or recommend. Make it easy for them to find your contact info.
2. Too simple? Try adding a call to action to your email signature
 - a. [Call to Action Examples by Zillow](#)
3. Need help creating your email signature? Here are a few websites you can use to help generate your signature for personal use. These websites have both free and paid for templates.
 - a. [Signature.email](#)
 - b. [Wisestamp.com](#)
 - c. [GMail Templates By Zapier](#)



VOICEMAIL

Voicemail is an important point of contact for your business. If your voicemail greeting is missing, unprofessional or your mailbox is full it will give caller a negative impression. Keep these fundamentals in mind when approaching voicemail messages:

1. Every single call should be treated as a VIP client, a VIP future client, or someone who can refer you to a great client.
2. If you can't answer a call make sure your voicemail is set up to make your caller know that they have made a connection. They need to know that:
 - a. They reached the right person. You are the biggest part of your brand. Let your clients know they chose a professional.
 - b. You are glad they called. Your positive message will convey that you are a dedicated agent that gets the job done.
 - c. You are ready to do business. Follow up is huge. "at your convenience" isn't good enough. Within 24 hours is too long. They need to know that you are available to help them. Call them back quickly...send a text to let them know you got the message and that you will respond.

Voicemail Greetings Examples:

Hello, you have reached the voicemail of Lisa Gudath with Dalton Wade. I love real estate and I am committed to providing expert service. Please leave your name and number, and I will call you back as soon as possible.

Hi, you've reached Lisa Gudath with Dalton Wade. Follow up and follow through are important to me. Please leave your name, number and a message so that I can respond quickly.

Hello, you've reached Lisa Gudath with Dalton Wade, your real estate expert. Please leave me your name and number, and I will get back to you quickly.



**Some important details
on *getting paid!***

GETTING PAID & OTHER IMPORTANT INFO

GETTING PAID

You need to fill out a W9 for us to have on file so you can be paid at closing and we will have the information to provide you a 1099 at the end of the year.

Optional for our agents in Florida:

Are you creating a business name so you can get paid in that name for tax purposes? If so, you must follow certain rules (ex. the name has to be your legal name + LLC, it can not be fictitious) & you must change your license name with the DBPR - consult a tax professional if interested.

Quick Guide to Loops and Getting Paid:

1. Create Your Loop
 - a. Click "+ New Loop"
 - b. Name it the property address
 - c. Select loop template type (listing for sale, residential purchase, vacant land, new construction, referral, etc.).
2. Add Participants
 - a. Scroll down to the "People" section
 - b. Add your clients & parties to this transaction with emails. This will enable you to autofill docs and pre-replaces initials/signatures for any template docs.
3. Docs/Signatures/Folder
 - a. Add additional docs you might need
 - b. Get everything signed
 - c. Review your folder(s) to ensure documents are signed & placeholder documents have been uploaded and signed if required.
 - d. Archive unsigned, unneeded or duplicate documents by clicking on the 3 dots next to the document & clicking "Archive".
4. Submit Completed Folders for DW Compliance Review
 - a. Click "SUBMIT FOR REVIEW" at the top right
 - b. Check the box for the folder (s) you are submitting
 - c. Click "SUBMIT".
 - d. Your documents & folders will change from "NOT SUBMITTED" to "NEEDS REVIEW". Once reviewed (w/in 24 hours), they will change to say approved or rejected.
 - e. Rejected will have notes in Dotloop under "Notes" on how to fix them.
5. **Ensure You Get Paid at Closing and Don't Have to Wait for Your Money**
 - a. Submit your signed docs to compliance within 48 hours of signature
 - b. Submit your Commission Disbursement Authorization (CDA) within 10 days of closing - not last minute.

TO DO LIST

Fill out your W-9 so we can collect tax information for your 1099, and email to Miles@DaltonWade.com when complete. **This is required.**

DOWNLOAD
FILLABLE W9 FORM

AGENT REFERRAL PROGRAM

Help us recruit other top agents and earn \$500 each time you do via an agent referral. For each real estate agent that you refer to Dalton Wade Real Estate Group, you will receive a \$500 agent referral fee after that agent stays with us for at least 60 days!

LEARN MORE

TRANSACTION COORDINATOR

Whether you're feeling overwhelmed or simply looking to reclaim some valuable time, Dalton Wade provides a solution with our Transaction Coordinators. All of our TCs are licensed with the company and have undergone training in Dalton Wade's "Best Compliance Practices." By entrusting your file to a Dalton Wade TC, you can expect them to dedicate approximately 10-15 hours to ensure compliance and efficiency. This allows you to redirect your focus towards high-value real estate activities, such as training and development.

LEARN MORE



Dalton Wade offers the convenience of an *in-house* Title Company for our agents in Florida and a *recommended* preferred lender.

PREFERRED LENDERS & TITLE COMPANY



Welcome to Turner Title, your trusted partner in the real estate closing process! At Turner Title, we pride ourselves on providing top-notch title insurance and closing services to ensure a smooth and secure experience for our clients. Our dedicated team of professionals is committed to guiding you through every step of the closing journey. From our state-of-the-art technology solutions, like the Turner Title Prospector and Zoccam, to our personalized customer service, we aim to exceed your expectations. Whether you're a seasoned real estate professional or a first-time homebuyer, Turner Title is here to make your closing process seamless and stress-free. Thank you for choosing Turner Title for your title and closing needs! Please note: Turner Title is available for all of our agents in Florida.



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Phone: (727) 914 - 4590

Website: www.TurnerTitle.com



Welcome to Pioneer Mortgage Funding Inc., your trusted partner in homeownership. We offer competitive rates, tailored loan programs, and a smooth approval process. Led by Courtland Hunt, an experienced mortgage professional, we're dedicated to making your homebuying experience rewarding. With Courtland's expertise and personalized service, you're in capable hands. Embark on the exciting path to your dream home with Pioneer Mortgage Funding Inc. and Courtland Hunt by your side.



COURTLAND HUNT
courtland@pmfmortgage.com
Branch Manager / Loan Originator

CONTACT INFO

Phone: (813) 300 - 9281

Website: www.courtlandhunt.com



MiMutual, as Dalton Wade's preferred lender, not only supports our agents in Florida but is also available in most other states. They provide a range of financing options, including but not limited to conventional and government financing, jumbo loans, and renovation financing. Explore all their loan options and more at <https://mimutual.com>.



DANIEL MACIEL
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Branch Manager / Loan Originator

CONTACT INFO

Phone: (800) 700 - 5839

Website: <https://mimutual.com>



**Only a *few more steps* to get up
and running with Dalton Wade.**

NEXT STEPS

Congratulations once again on joining the Dalton Wade Real Estate Group. Below, you'll discover the next steps and a comprehensive checklist summarizing everything covered in this packet. This will help ensure you are fully prepared for your real estate journey with us.

NEXT STEPS

1. **Sign Up For General Orientation Onboarding**
 - a. We provide one-on-one orientations for our agents. Sign up for an available time [here](#).
2. Join Your Board of Realtors/MLS
 - a. Joining a Board is required. Your applicable board should be in your intro email from Phil. Applications will be on the Board website. If you already belong to a board, have them transfer you to DW.
3. Transfer Active Listings
 - a. Transfer listings over to DW in your MLS (if applicable) if you have any listings with your prior brokerage. Most brokerages will allow you to transfer ACTIVE listings.
4. Confirm Your Logins Are Working
 - a. You should be receiving a separate email inviting you to set up your [Boomtown](#) password. Your login email will be the email address you used when you joined DW.
 - b. You should be receiving a separate email inviting you to set up your [Dotloop](#) password. Your login email will be the email address you used when you joined DW.
5. Send in Your Photo & Bio
 - a. Send your headshot and short bio to support@daltonwade.com. They will add these to your Boomtown website and make you visible on the main daltonwade.com website.
6. Fill and send W9 tax form to Miles Digati at Miles@daltonwade.com.



COMPREHENSIVE CHECKLIST

Use this checklist to ensure you have done everything you need to do as a new Dalton Wade agent.

- » Join Board of Realtors and MLS
- » Transfer Active Listings
- » Confirm Logins are Working
- » Send in Photo & Bio to Support
- » Schedule General Orientation Onboarding
- » Send W9 tax form to Miles@DaltonWade.com
- » Sign up on the Knowledge Base website to submit support ticket requests [here](#)
- » Set up or revise your email signature to reflect DW branding
- » Create and order DW business cards and signs
- » Create or update social media and agent profiles
- » Attend [live trainings](#) or watch [on-demand trainings](#) offered by DW. (Dotloop training is required!)
- » Join [Dalton Wade Agents](#) Facebook group.
- » Learn about the [Transaction Coordinators](#) and how they could help you.
- » Learn about our [Mentorship Program](#) and see if it's a good fit for you.
- » Learn about [Turner Title & Pioneer Mortgage Funding Inc](#)