SIEVERS REAL ESTATE

Switching Real Estate Brokerages

A Seamless Transition Guide

Considering a switch? Here's how to move to a new brokerage without disrupting your business.

Deciding to change real estate brokerages is a significant decision, often driven by a desire for better support, resources, or a more suitable work environment. While this change can be positive for your career, navigating the process seamlessly is crucial to minimize disruption. This guide equips you with the knowledge and steps necessary for a smooth transition.

Before You Begin

STEP 1 Self-Assessment

- **Identify your needs and goals.** What are you looking for in a new brokerage? A higher commission split, stronger training programs, or a specific company culture? Answering these questions helps you target your search.
- **Review your current contract.** Understand what happens with any active listings or pending transactions. Can you move active listings to your new brokerage? Will your commission payout adhere to your standard split? Are there leads or referrals you'll need to leave behind? If you're leaving a team, review that agreement too — there may be a non-compete clause.
- **Scrub your database.** If you use your current brokerage's CRM, confirm you can export your contacts. Go through them, make sure they're up to date, and delete anyone you don't intend to communicate with going forward.

STEP 2 Finding the Right Fit

- **Gather referrals.** Talk to colleagues, friends, lenders, attorneys, and title & escrow reps for trusted recommendations.
- **Research and compare.** Explore options based on commission splits, training and support, marketing resources, company culture, and niche focus. Narrow your options to two or three brokerages to interview.
- **Interview potential brokerages.** Remember, you're interviewing them as much as they're interviewing you. Talk to brokers within the organization, the administrative staff, and any other points of contact. Ask what their onboarding process looks like and how long it takes. Get a copy of their independent contractor agreement to review, and ask what to bring to onboarding should you decide to join.

Communicating the Change

STEP 3 Notify Your Current Broker

- **Provide formal notice.** Give written notification of your decision.
- **Maintain professionalism.** Keep the conversation respectful and avoid negativity.
- **Release your license.** In Washington State, you can release your license yourself through the Department of Licensing. The Designated Broker at the brokerage you're leaving will receive an email that your license has been removed from their firm, and your license will immediately go into “inactive” status. Do this only after you have an onboarding appointment scheduled with your new brokerage.

Transitioning to Your New Home

STEP 4 Meet With Your New Brokerage's Onboarding Team

Bring your laptop and the bank information for the account where you'd like commission payments deposited. If you have an LLC, have your EIN handy. Take advantage of upcoming firm training sessions and events — get involved and connect with your new colleagues.

STEP 5 Transfer Your License and Listings

- **Activate your license.** In Washington, the Designated Broker or an administrator will email you an invitation to join their brokerage through the Department of Licensing. Once you accept, your license will be Active under your new firm.
- **Address in-process transactions.** Discuss the best course of action for in-process transactions with your old brokerage. In Washington, when you're removed from your old brokerage's MLS roster, active listings immediately transfer to that Designated Broker. If you're permitted to take them with you, the old Designated Broker must email NWMLS staff to transfer the listing to the Designated Broker at your new brokerage, who can then transfer it to you.

STEP 6 Update Your Marketing Materials

- **Reflect your new affiliation.** Update your website, business cards, listing signs, open house signs, social media accounts, Google Business Profile, and other marketing materials to reflect your new brokerage. Follow brokerage and Department of Licensing guidelines.

STEP 7 Inform Your Clients

- **Be transparent.** Let clients know about your move and how they can reach you after the transition.
- **Build excitement.** Launch your new branding the way you'd launch a new listing hitting the market.

Remember

- **Professionalism is key.** Maintain a professional demeanor throughout the entire process.
- **Protect your relationships.** Avoid burning bridges with your current broker — a positive professional network benefits you long-term.
- **Embrace new opportunities.** See this change as a positive step toward your career goals.

Thinking about making the move?

We'd love to tell you what a transition to Sievers Real Estate could look like — no pressure, just a conversation.

Sievers Real Estate (253) 851-0745 info@sieversrealestate.com sieversrealestate.com