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Sandicor Staff Use Only
Date: _____
Staff Initials: _____
Transfers Done: _____

Membership Transfer Disclosure & Acknowledgment

FROM: Agent Name _____ Office Name _____

Phone (_____) _____ Fax (_____) _____ EMAIL _____

Note: If the agent name and or office name do not match the old ID agent and or office names (i.e. due to a married or name change), please note the names(s) associated with the old agent ID:

Agent: _____ Office Name: _____

FROM AGENT ID: _____ **TO AGENT ID:** _____

FROM OFFICE ID: _____ **TO OFFICE ID:** _____

What Gets Transferred In Paragon:

- **Contacts** ***Client Connect Links will need to be resent to your clients due to your new agent ID***
- **CMA(s)**
- **Saved Searches**
- **Listings from your current brokerage***

What Does Not Get Transferred In Paragon:

- **Paragon Preferences will need to be setup again including: re-load agent photo and signature**
- **Re-create any Saved Spreadsheets and Custom Reports**

Listing History is not transferred from prior brokerages. Inventory Searches will now be done using both your Old ID and New ID OR using your CA BRE#

<p><u>Steps to do an Inventory Search by agent ID:</u> Click on Multi Class – Remove all Statuses and County</p>	<p><u>Steps to do an Inventory Search by BRE#:</u> Click on Multi Class – Remove all Statuses and County</p>
<p>Click in Field List or Sell Agent and find both active and inactive ID(s) for you.</p>	<p>Click in Field List Agent BRE License and input the 8 digit license number and click Search, to see all transactions where this license is the listing agent.</p>
<p>Select all that apply and click on Search</p>	<p>Repeat the above step using Selling Agent BRE License# to see transactions where this license is the selling agent.</p>
<p>This will give you your complete inventory regardless of office in the MLS.</p>	<p>This will give you your complete inventory regardless of office in the MLS.</p>

I hereby authorize the transfer of all of my listings and other relevant data to my new ID number at the _____ Association of REALTORS®. This transfer form does not include the transfer of your lockbox key or lockboxes you may own, nor any IDX services you obtain from Sandicor.

SIGNATURE: _____ DATE: _____