Business Profile Pro

BUSINESS PROFILE PRO · FREE GUIDE

First 90 Days as a New Real Estate Agent

A week-by-week plan for your first 13 weeks — checklists, daily routine, compliant sample scripts, and the tools that help a new agent get found.

For newly licensed U.S. agents

13 WEEKS

1	2	3	4	5	6	7	8	9	10	11	12	13
MONTH 1 · FOUNDATION				MONTH 2 · MOMENTUM				MONTH 3 · PIPELINE				

WELCOME

You passed the exam. Now build the business.

Your license lets you practice real estate. Your first 90 days decide whether people know it. This guide turns that stretch into 13 focused weeks so you always know what to do next.

The plan is built on practices most brokers and trainers teach new agents: start with the people who already know you (your **sphere of influence**), learn your MLS and contracts before you need them, host open houses, follow up through a CRM, and build an online presence that's easy to find on Google. It also covers the rules that trip new agents up: advertising disclosures, Fair Housing, calling and texting laws, and the 2024 NAR settlement changes.

COMPLIANCE

One important caveat: your state and your broker set the rules

Licensing, advertising, post-licensing and continuing-education rules are set **state by state** by your real estate regulator, like the California Department of Real Estate or the Nevada Real Estate Division. Your MLS, your local association and your brokerage add their own policies on top. Wherever this guide says *"check with your broker / state"*, do exactly that. ARELLO keeps a directory of every state's regulatory agency.

How to use this guide

- **Do the "Before Day 1" checklist first.** Several items, like license activation and brokerage affiliation, must be done before you can legally do licensed work.
- **Work one week at a time.** Each week has a goal, 4–6 tasks, and a simple metric to track. Running a week behind is fine. Skipping the compliance steps is not.
- **Run the daily routine.** Consistent daily conversations will do more for you than occasional big pushes.
- **Adapt the scripts** to sound like you, and get any marketing approved by your broker before you use it.

What's inside

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SETUP & COMPLIANCE

BEFORE DAY 1

Get licensed, affiliated and insured

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Finish these before you advertise, show property, or talk to anyone about representing them.

1 · License activation & brokerage affiliation

- [ ] **Confirm your license is issued and active** on your state regulator's public license lookup.
- [ ] **Affiliate with a supervising (responsible) broker.** In most states a salesperson can't do licensed activity on their own. California, for example, treats a salesperson with no broker as "Licensed – NBA" (no broker affiliation), and they can't do licensed activities until a responsible broker certifies the affiliation through DRE eLicensing or form RE 214.
- [ ] **Sign your independent-contractor / salesperson agreement** with the brokerage and keep a copy. (California requires the broker to keep a signed written agreement on file.)
- [ ] **Note your post-licensing / first-renewal education deadline.** Requirements vary widely. Nevada, for example, requires most first-time salespersons to complete 30 hours of post-licensing education within their first year. Look up your own state's rule and put the date on your calendar.

2 · Brokerage onboarding

- [ ] Get the **policies & procedures manual**, the **advertising-approval process**, and the **transaction file / document submission checklist**.
- [ ] Find out who your **supervising broker or mentor** is, how fast they respond, and how to escalate a contract question.
- [ ] Understand your **commission split, caps, desk/tech fees** and when you get paid.
- [ ] Get brokerage-approved **logos, required disclosure wording**, and your email and signature.

3 · MLS, local association & NAR membership

- [ ] **Join your MLS** (usually through the brokerage) and book the new-member/MLS system training.
- [ ] **Decide on REALTOR® membership.** You join NAR by joining a **local REALTOR® association**, which also makes you a member of your state association. New members complete a Code of Ethics orientation (NAR requires at least 2.5 hours), plus 2.5 hours of ethics training each three-year cycle. The current cycle runs Jan 1, 2025 – Dec 31, 2027.
- [ ] **Use REALTOR® correctly.** It's a membership mark, not a job title. Only members may use it, and only alongside their own name or firm name. Non-members should say "real estate agent" or use their state's license title.

4 · Errors & omissions (E&O) insurance

- [ ] **Ask your broker whether you're covered** under the brokerage E&O policy and what it excludes. Get a certificate if one is available.
- [ ] **Check whether your state requires individual E&O.** Some states, including Colorado, Iowa and Tennessee, require licensees to carry coverage, so check your regulator's rules.

BEFORE DAY 1 · CONTINUED

Set up the money and learn the rules

5 · Business budget & tax set-aside

Most agents are paid as independent contractors (Form 1099). That means no tax is withheld from your commissions and you pay your own Social Security and Medicare through **self-employment tax**. The IRS lists that rate as **15.3%** (12.4% Social Security up to the annual wage base, plus 2.9% Medicare) on net self-employment earnings, *before* income tax. Self-employed people generally pay **quarterly estimated taxes** using Form 1040-ES.

15.3%
Self-employment tax on net self-employment earnings

12.4%
Social Security, up to the annual wage base

2.9%
Medicare

Source: IRS, Self-employment tax · Estimated taxes (Form 1040-ES)

- [ ] **Open a separate business checking account** and a separate **tax savings account**.
- [ ] **Pick a set-aside percentage with a tax professional** and move it out of every commission check the day you're paid.
- [ ] **Put the IRS estimated-tax due dates on your calendar** (see IRS "Estimated taxes").
- [ ] **Track mileage and business expenses** from day one in an app or spreadsheet.
- [ ] **Write a 90-day budget:** MLS/association dues, brokerage fees, E&O, lockbox/key access, signs, website, CRM, marketing, and personal living costs while your first commission is pending.

Budget line (fill in your real numbers)	Monthly	One-time
MLS / association / NAR dues		
Brokerage desk, tech or transaction fees		
E&O insurance (if not covered by brokerage)		
Website, domain, CRM, email marketing		
Signs, lockbox / key access, business cards		
Open-house supplies, marketing, client gifts		
Tax set-aside (percentage of each commission)	___ %	

BEFORE DAY 1 · CONTINUED

Compliance basics to know cold

These four topics come up in your first conversations, ads and showings. Learn them before you need them.

- [ ] **Advertising disclosures.** Many states require your **brokerage's name** (and often your license number) in your ads. California requires your name, 8-digit license number and responsible broker's name on "first point of contact" materials like business cards, websites, flyers and ads. Nevada requires ads to identify the brokerage prominently and include the licensee's license number.
- [ ] **Fair Housing.** Federal rules (24 CFR 100.75) ban ads, statements or notices that show a preference or limitation based on race, color, religion, sex, disability, familial status or national origin. That includes word choice, photos and *where* you place or target ads. Many states add more protected classes.
- [ ] **2024 NAR settlement practice changes** (effective Aug 17, 2024). MLS participants working with a buyer must have a **written buyer agreement before touring a home**, including live virtual tours. The agreement must state the compensation clearly, say it isn't open-ended, and say commissions are not set by law and are fully negotiable. **Offers of compensation to buyer brokers are not allowed on the MLS.**
- [ ] **Calls, texts and email.** The Do Not Call rules, TCPA consent rules and CAN-SPAM all apply to prospecting. They're covered on page 15.

Aug 17, 2024
NAR settlement practice changes took effect

24 CFR 100.75
Federal rule on discriminatory advertisements

Sources: NAR Settlement FAQs · eCFR

TIP

Ask your broker in week 1

- [ ] What exactly must appear on my business cards, website, social profiles, signs and email signature?
- [ ] Which buyer agreement form do we use, and when do I present it?
- [ ] What is our Do Not Call / text-consent policy, and who scrubs our call lists?
- [ ] Who approves my marketing, and how long does approval take?

> **"Running a week behind is fine. Skipping the compliance steps is not."**
>
> FROM "HOW TO USE THIS GUIDE"

WEEKS 1–4

THE 13-WEEK PLAN · MONTH 1: FOUNDATION

Weeks 1–2

01

WEEK 1 — Build your business foundation

Goal: your systems are set up and your contact list is in one place.

- [ ] **Set up a CRM** and import every contact from your phone, email, social accounts and old address books.
- [ ] **Tag each contact**, for example A (would refer you now), B (knows you well), C (acquaintance), and add a note on how you know them.
- [ ] **Block your calendar** with daily prospecting, learning and follow-up time (see the daily routine on page 13).
- [ ] **Write and practice a 30-second introduction:** who you are, your brokerage, the area you serve, and how you help.
- [ ] **Order business cards** only after your broker approves the layout and required disclosures.

TRACK Contacts entered ——— · Tagged A/B ——— · Prospecting blocks scheduled ———

WEEK 2 — Learn your MLS, forms & market

Goal: you can answer basic "what's happening in my neighborhood" questions.

- [ ] **Finish MLS training.** Learn searches, saved searches, auto-alerts, CMAs and the MLS rules on listing input and photos.
- [ ] **Pick one or two focus areas** and set daily MLS alerts for new listings, price changes, pendings and solds.
- [ ] **Preview homes in person** (follow MLS/brokerage showing rules) and keep short notes on condition and price.
- [ ] **Walk through your state's purchase agreement and your brokerage's written buyer agreement** with your broker or mentor.
- [ ] **Learn the IDX basics.** If your website shows MLS listings through IDX, MLS rules generally require attribution to the listing brokerage. Ask your MLS for its IDX display rules.

TRACK Homes previewed ——— · Forms reviewed with broker ——— · Market-stat notes ———

Notes & questions for my broker

THE 13-WEEK PLAN · MONTH 1: FOUNDATION

Weeks 3–4

WEEK 3

Tell your sphere you're in business

Goal: everyone you know hears that you're now a licensed agent, and hears it from you.

- [ ] **Call or meet your A and B contacts personally.** Ask how they're doing, share your news, and ask who they know who's thinking of moving (script on page 14).
- [ ] **Send a personal announcement** by email or mail with your brokerage name and the license disclosures your state requires. Get it broker-approved first.
- [ ] **Post a broker-approved announcement** on your personal social media accounts.
- [ ] **Log every conversation in your CRM** with a follow-up date.
- [ ] **Before calling anyone you *don't* have a personal relationship with,** learn your brokerage's Do Not Call process.

TRACK Conversations ——— · Referrals asked for ——— · Appointments set ———

WEEK 4

Launch your online presence

Goal: when someone searches your name, they find a professional, compliant agent.

- [ ] **Launch a simple website** with a bio, the areas you serve, a contact form, your brokerage name, your license number and your state's required disclosures.
- [ ] **Create or claim your Google Business Profile.** Google lists real estate agents as "individual practitioners." If you don't meet clients at an address, set it up as a service-area business and hide the address.
- [ ] **Make your name, photo and bio match** everywhere: website, Google, social profiles and your brokerage roster.
- [ ] **Add a consent checkbox to every web form** that will lead to calls or texts (TCPA; see page 15).
- [ ] **Get a professional headshot** and write a 150-word bio. Don't make claims you can't back up, like "top agent" or "#1."

TRACK Profiles live ——— · Website form tested ——— · Conversations ———

Notes & questions for my broker

Weeks 5–6

02

WEEK 5 — Shadow, then host your first open house

Goal: meet new people face to face and capture follow-ups the right way.

- [ ] **Shadow an experienced agent** at an open house, a buyer consultation and, if possible, a listing appointment.
- [ ] **Ask colleagues in your office** whether they'd let you host one of their listings. Get the listing agent's and seller's permission and follow brokerage safety policy.
- [ ] **Prepare:** neighborhood comps, a printed property sheet with the required disclosures, and a sign-in sheet or app. If you plan to text, include a **text-consent checkbox**.
- [ ] **Use a safety plan:** tell someone where you are, keep your phone charged, and know the exits.
- [ ] **Follow up within 24 hours** with everyone who signed in (sample text on page 14).

TRACK Open houses ——— · Sign-ins ——— · Follow-ups sent ——— · Appointments ———

WEEK 6 — Build your buyer consultation

Goal: you can confidently explain your services and the written buyer agreement.

- [ ] **Create a short buyer presentation:** your process, what you do at each step, and the timeline.
- [ ] **Practice explaining the written buyer agreement** with your broker: what it covers, how compensation is set, and that **commissions are negotiable and not set by law**.
- [ ] **Remember the sequence:** a signed written agreement comes *before* touring a home, in person or live virtual, unless state or federal law says otherwise.
- [ ] **Build a lender/pre-approval step** into your process. Give buyers several options; don't push one lender.
- [ ] **Role-play the consultation** at least twice with a mentor or colleague.

TRACK Role-plays ——— · Buyer consultations booked ——— · Conversations ———

Notes & questions for my broker

THE 13-WEEK PLAN · MONTH 2: MOMENTUM

Weeks 7–8

WEEK 7

Systemize follow-up & nurture

Goal: no lead or contact falls through the cracks.

- [ ] **Set up CRM follow-up plans,** for example a new-lead plan, an open-house plan and a monthly sphere touch.
- [ ] **Start a monthly email** (local market notes, a helpful tip, community events) that meets CAN-SPAM: honest subject line, your physical postal address, and a working unsubscribe.
- [ ] **Create one simple lead magnet**, like a buyer guide or a neighborhood report, with an opt-in form and clear consent wording.
- [ ] **Write saved-search alerts** for any active buyers you're working with.
- [ ] **Spend one hour clearing your CRM:** every contact gets a next step and a date.

TRACK Contacts with a next step ——— · Email subscribers ——— · Conversations ———

WEEK 8

Learn the listing side

Goal: you're ready for your first listing appointment.

- [ ] **Prepare three practice CMAs** on homes in your focus area and review them with your broker.
- [ ] **Build a listing presentation** covering pricing approach, marketing plan, preparation and timeline.
- [ ] **Learn your brokerage's listing paperwork,** including the required compensation disclosures to sellers.
- [ ] **Practice Fair Housing-safe listing descriptions.** Describe the property, not the people (say "near the park," not "perfect for young families").
- [ ] **Understand MLS rules** on input deadlines, photos and showing instructions.

TRACK CMAs practiced ——— · Seller conversations ——— · Listing appointments ———

Notes & questions for my broker

Weeks 9–10

03

WEEK 9 — Choose a farm or niche

Goal: become a known local resource in one place or for one audience.

- [ ] **Pick a geographic farm** (a neighborhood or subdivision) or a niche you know, such as first-time buyers or relocation.
- [ ] **Attend or sponsor one community event,** and follow brokerage advertising rules on anything branded.
- [ ] **Publish one local piece**, like a market update, a "what sold this month" post, or a local-business spotlight. Follow the MLS rules on using its data.
- [ ] **Review your ad targeting.** HUD warns that targeting housing ads by protected characteristics, or proxies for them, can violate the Fair Housing Act.
- [ ] **Add your farm or niche** to your website, Google Business Profile service area and bio.

TRACK New contacts met ——— · Content pieces ——— · Conversations ———

WEEK 10 — Reviews & reputation

Goal: a steady, honest way to earn reviews.

- [ ] **Ask every person you've actually helped** for an honest review on your Google Business Profile. Make it easy with a direct link.
- [ ] **Don't buy or reward positive reviews.** The FTC's consumer-review rule bans offering incentives that depend on the review being positive (or negative).
- [ ] **Never post fake or "insider" reviews,** and don't gate requests so only happy clients get asked.
- [ ] **Reply to every review** professionally, and never share client details.
- [ ] **Before quoting a review** in an ad or on your website, check your broker's policy on testimonials.

TRACK Review requests sent ——— · Reviews received ——— · Replies posted ———

Notes & questions for my broker

THE 13-WEEK PLAN · MONTH 3: PIPELINE

Weeks 11–12

WEEK 11 — Build your professional bench

Goal: trusted vendor relationships you can share with clients.

- [ ] **Meet several lenders, inspectors, and title/escrow contacts** your broker trusts.
- [ ] **Build a "preferred providers" list with at least two options per category** so clients can choose.
- [ ] **Ask your broker about RESPA before any referral arrangement or co-marketing.** RESPA Section 8 generally bans fees, kickbacks or "things of value" for referring settlement-service business.
- [ ] **Connect with other agents** for referrals in and out of your market, under your brokerage's referral policy.
- [ ] **Add every partner to your CRM** with a next touch date.

TRACK Partner meetings ——— · Agent referral contacts ——— · Conversations ———

WEEK 12 — Manage your pipeline & transactions

Goal: every active opportunity has a clear next step and a clean file.

- [ ] **Sort your CRM by stage:** new lead → nurturing → appointment set → agreement signed → under contract → closed.
- [ ] **Build a transaction checklist** with your brokerage's required documents and every contract deadline.
- [ ] **Submit documents for broker review on time.** Late or missing files are a common compliance problem.
- [ ] **Send a quick update** to every active buyer and seller, even when there's nothing new.
- [ ] **Host another open house** or two and run the follow-up plan.

TRACK Active opportunities ——— · Agreements signed ——— · Appointments ———

Notes & questions for my broker

THE 13-WEEK PLAN · MONTH 3: PIPELINE

Week 13 & your 90-day review

WEEK 13

Review, adjust, plan the next 90

Goal: double down on what worked and set targets for the next quarter.

- [ ] **Add up your totals:** conversations, appointments, agreements signed, contracts and closings.
- [ ] **Compare your budget to actual spending,** and check your tax set-aside against the next estimated-tax due date.
- [ ] **Find your best lead source so far,** whether that's sphere, open houses, online or referrals, and give it more time next quarter.
- [ ] **Confirm your education deadlines** (post-licensing, CE, ethics) and your renewal date with your state.
- [ ] **Meet with your broker** to set your next-quarter plan.

TRACK Conversations · Appointments · Agreements · Closings

> **"Consistent daily conversations will do more for you than occasional big pushes."**
>
> FROM "HOW TO USE THIS GUIDE"

13-week scorecard

Week	Conversations	Appointments	Agreements	Notes
1–2				
3–4				
5–6				
7–8				
9–10				
11–12				
13				
Total				

Set your own weekly targets with your broker. Results depend on your market, your time, and your effort. This guide doesn't promise any particular outcome.

DAILY ROUTINE TEMPLATE

A repeatable day

Adjust the times to fit your life. What matters is protecting the prospecting block, every working day.

Time block	Focus	What to do	Done
Early morning	Plan & learn	Review MLS alerts (new, price changes, pending, sold). Check calendar and CRM tasks. 15 minutes of learning (contracts, scripts, market).	☐
Mid-morning (protected)	Prospecting	Sphere calls and personal notes. Reconnect with past colleagues. Follow-ups with people who gave consent. Log every conversation.	☐
Late morning	Follow-up	Return messages, send listings to buyers, update active clients, set appointments.	☐
Afternoon	Appointments & previews	Showings (with a signed buyer agreement), consultations, listing appointments, previewing homes, vendor meetings.	☐
Late afternoon	Marketing & admin	One piece of content or a Google Business Profile post. Submit documents for broker review. Log expenses and mileage.	☐
End of day	Shutdown	Update your CRM, set tomorrow's top 3 tasks, and record your daily numbers below.	☐

Daily numbers

Conversations: _____

Personal notes / messages: _____

Appointments set: _____

CRM contacts added: _____

Homes previewed: _____

Tomorrow's top 3

☐ _____

☐ _____

☐ _____

TIP A "conversation" is a real two-way exchange about the person's life or real estate plans. A voicemail or a "like" doesn't count. Counting the same way every day keeps your numbers honest.

SAMPLE SCRIPTS

Words to start with

Make these sound like you, and get any written version approved by your broker. Fill in the bracketed placeholders.

SCRIPT 1 · SPHERE CALL (SOMEONE YOU KNOW PERSONALLY)

You: "Hi [Name], it's [Your Name]. Do you have a couple of minutes? … How have you been? How's [family / job / the new house]?"

"I wanted you to hear it from me: I've gotten my real estate license and joined [Brokerage Name] here in [Area]. I'm not calling to sell you anything. I'm letting the people I care about know, so if real estate questions ever come up, you have someone to ask."

"While I have you, is anyone you know talking about buying, selling or renting in the next year? … Thank you. Would it be OK if I sent you a short market update now and then? And what's the best way to reach you?"

Log the call in your CRM, note what they agreed to (for example email updates), and set a follow-up date.

SCRIPT 2 · OPEN-HOUSE FOLLOW-UP TEXT (ONLY IF THEY CHECKED THE TEXT-CONSENT BOX)

"Hi [Name], this is [Your Name] with [Brokerage Name]. Thanks for stopping by the open house at [Street] today. You mentioned [detail]. Want me to send a few similar homes in [Area]? Reply STOP to opt out."

Send it manually from your own phone. Include your name and brokerage, and honor opt-outs right away. If someone didn't give consent for texts, follow up by email or phone instead, under your brokerage's policy.

SCRIPT 3 · PAST-COLLEAGUE EMAIL

Subject: Some news, plus a favor

Hi [Name],

I hope things are going well at [Company]. I wanted to share some news: I've gotten my real estate license and joined [Brokerage Name], serving [Area].

I loved working with you on [project], and I'll bring that same attention to detail to helping people buy and sell homes. If you or anyone on the team ever has a question about the market, a relocation, or a first purchase, I'm happy to help, with no pressure.

Would you be open to a quick coffee in the next few weeks to catch up?

[Your Name] · [Brokerage Name] · License # [____]
[Brokerage street address, as required for commercial email]
If you'd rather not receive real estate updates from me, just reply "unsubscribe" and I'll remove you.

PROSPECTING COMPLIANCE

Call, text and email the right way

These federal rules apply to real estate prospecting. Your state may add stricter ones, and your brokerage may have its own policy, so follow whichever is stricter.

Do Not Call (FTC Telemarketing Sales Rule / FCC)

FEDERAL RULE

- Telemarketers who are required to use the National Do Not Call Registry must check their call lists against it **at least every 31 days**. Access goes through an annual subscription at telemarketing.donotcall.gov.
- FCC rules prohibit telemarketing calls to homes before **8 a.m.** or after **9 p.m.** (local time), and callers must honor do-not-call requests made during a call.
- Many states keep their own do-not-call lists. Ask your broker how your office scrubs lists and keeps an internal do-not-call list.

TCPA: autodialed and prerecorded calls and texts

FEDERAL RULE

- The FCC requires consent before autodialed or prerecorded calls or texts to a cell phone. **Commercial texts require written consent**, and prerecorded telemarketing calls require prior written consent (which can be given electronically, for example through a website form).
- People can opt out of robocalls and robotexts at any time, in any reasonable way, so honor "STOP" and similar replies.
- Use clear consent wording on sign-in sheets and web forms, and keep a record of the consent.

CAN-SPAM: commercial email

FEDERAL RULE

- Use accurate "From" details and a subject line that isn't deceptive. Identify the message as an ad where required.
- Include a **valid physical postal address** and a clear way to opt out. Honor opt-outs **within 10 business days**.
- You stay responsible even if a vendor sends the email for you.

Fair Housing in every message

COMPLIANCE

Talk about properties, features and locations, not about who "should" live there. Don't steer buyers toward or away from neighborhoods. Place and target ads so no protected group is excluded. Report concerns to your broker.

TOOLS CHECKLIST

The new-agent tech stack

You don't need everything on day one. You do need these four basics working together.

Website

- [ ] Bio, headshot, service areas
- [ ] Brokerage name, license # and state-required disclosures
- [ ] Contact form with call/text consent wording
- [ ] IDX listings (if allowed) with listing-brokerage attribution
- [ ] Fair Housing / Equal Housing Opportunity statement (ask your broker)

CRM

- [ ] All contacts imported and tagged
- [ ] Follow-up plans: new lead, open house, sphere
- [ ] Pipeline stages and task reminders
- [ ] Consent and opt-out tracking
- [ ] Email that meets CAN-SPAM

Lead magnets

- [ ] Buyer guide and/or seller guide
- [ ] Neighborhood or market report
- [ ] Opt-in landing page with clear consent
- [ ] Automatic delivery plus a follow-up email series

Google Business Profile

- [ ] Real name as used in the real world (no keyword stuffing)
- [ ] Service area set, address hidden if you don't meet clients there
- [ ] Correct category, photos, services and description
- [ ] Review link ready to share, with replies to every review

Want this set up for you?

Business Profile Pro's **New Agent Starter Package** sets up your website, CRM, lead magnets and Google Business Profile in 7 days. You stay in charge of your brokerage's approvals and your state's disclosure requirements.

Option	Setup	Monthly
DIY	$297	—
Done-For-You	$997	$97/mo
Done-For-You + Marketing	$1,497	$297/mo

Details at **businessprofilepro.com**. Doing it yourself with this checklist works too.

COMPLIANCE DISCLAIMER

Please read

Business Profile Pro is a marketing and technology service. It is not a real estate brokerage, does not hold a real estate license, does not supervise licensees, and does not represent buyers or sellers.

This guide is general educational information, not legal, tax, insurance or financial advice. Laws, regulations, MLS rules, association policies and industry practices change and vary by state and locality. Before acting on anything in this guide, check it with your supervising broker, your state real estate regulator, your MLS and local association, and qualified legal and tax professionals.

Your marketing must follow your brokerage's policies and your state's advertising rules, including any required brokerage name, license number and other disclosures. Get broker approval before you use any script, ad, website or social post.

Prospecting laws, including the Telephone Consumer Protection Act, the Telemarketing Sales Rule, the National and state Do Not Call rules, CAN-SPAM and state privacy laws, apply to calls, texts and emails. Make sure you have the consent you need and honor opt-outs.

Fair Housing: follow the federal Fair Housing Act and any state or local fair housing laws, which may protect additional classes.

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No results are guaranteed. Any targets in this guide are for planning only. Your results depend on your market, your effort and many other factors. Package prices and inclusions are set by Business Profile Pro and may change; see businessprofilepro.com for current terms.

SOURCE Information checked against the sources listed on the next page as of November 2026.

SOURCES

Sources & further reading

STATE REGULATORS

- California DRE, Real Estate Advertising Guidelines (RE 27): dre.ca.gov/files/pdf/re27.pdf
- California DRE, License Disclosure Requirements for Advertising (RE 559): dre.ca.gov/files/pdf/forms/re559.pdf
- California DRE, Salesperson Changes of Responsible Broker: secure.dre.ca.gov/faqs/online_chgemploy.htm
- Nevada Real Estate Division: red.nv.gov
- NAC 645.4442 (Nevada post-licensing education): nvrules.elaws.us/NAC/645.4442
- NAC 645.610 (Nevada advertising rules): law.cornell.edu/regulations/nevada/NAC-645-610
- ARELLO, Regulatory Agencies directory: arello.org/resources/regulatory-agencies

NATIONAL ASSOCIATION OF REALTORS®

- How to Become a REALTOR®: nar.realtor/membership/how-to-become-a-realtor
- Code of Ethics Training Requirements: nar.realtor … /code-of-ethics-training-cycles
- Membership Marks Manual: nar.realtor/membership-marks-manual
- Written Buyer Agreements 101: nar.realtor/the-facts/written-buyer-agreements-101
- NAR Settlement FAQs: nar.realtor/the-facts/nar-settlement-faqs
- Summary of MLS Policy Changes (2024): cms.nar.realtor … mls-policy-changes-summary
- Errors & Omissions Insurance: nar.realtor/errors-omissions-eo-insurance
- MLS Policy Statement 7.85, IDX attribution (via SFAR): sfar.freshdesk.com … policy-statement-7-85

FAIR HOUSING

- 24 CFR 100.75, Discriminatory advertisements: ecfr.gov … section-100.75
- HUD guidance on advertising through digital platforms (2024): archives.hud.gov … Digital_Platforms.pdf

PROSPECTING & CONSUMER PROTECTION

- FTC, Q&A on Do Not Call provisions of the TSR: ftc.gov … dnc-provisions-tsr-0
- FCC, Stop Unwanted Robocalls and Texts: fcc.gov/consumers/guides/stop-unwanted-robocalls-and-texts
- FTC, CAN-SPAM Act Compliance Guide: ftc.gov … can-spam-act-compliance-guide-business
- FTC, Consumer Reviews and Testimonials Rule Q&A: ftc.gov … consumer-reviews-testimonials-rule
- CFPB, 12 CFR 1024.14 (RESPA Section 8): consumerfinance.gov/rules-policy/regulations/1024/14

TAXES

- IRS, Self-employment tax: irs.gov … self-employment-tax
- IRS, Estimated taxes: irs.gov … estimated-taxes

E&O (STATE EXAMPLES)

- Colorado Division of Real Estate: dre.colorado.gov/broker-insurance-requirements
- Iowa DIAL, E&O insurance: dial.iowa.gov … eo-insurance

GOOGLE BUSINESS PROFILE

- Guidelines for representing your business on Google: support.google.com/business/answer/3038177

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