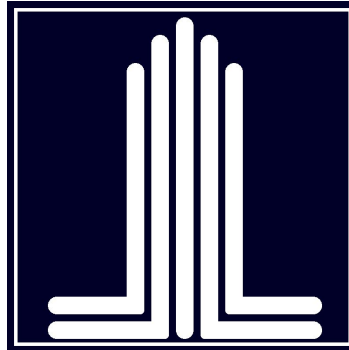


Texas Ally  
real estate group

# NEW AGENT ORIENTATION PACKET



Texas Ally  
real estate group

# **WELCOME TO TEXAS ALLY REAL ESTATE GROUP!**

**We are the premier real estate solutions company dedicated to serving Texans with integrity, respect, and professionalism in the search for their next home. We look forward to working with you and helping you to develop your own career in this exciting and revolutionary time in our industry!**

**This packet includes information on the forms needed to make your transition to Texas Ally Real Estate seamless.**



**Meet Koopa, our Texas Ally Mascot!**

# Contained In This Packet:

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- About Us
  - Staff
  - Logo
  - Website
- Accessing the Real Estate Boards
- Important Documents and info to be Submitted
- Transaction Management/Checklists
- How to Use Slack
- Texas Ally Associated Boards
  - Join
  - Member Benefits and Discounts
  - Helpful Links
- Contact Us

# About Us

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Texas Ally is the brainchild of a few broker professionals who asked themselves some very important questions. What if there was a real estate brokerage that honestly sought to align their interests with their agents and clients? A brokerage who, without hesitation, will tell you plainly what is wrong with the industry? A brokerage who realized the industry and market have moved in a new direction, who wants and expects more integrity from its professionals? A brokerage that brings those types of individuals under one roof? That is Texas Ally. Texas Ally understands that technology has forever changed the real estate industry, and intends to stay ahead of the curve by offering true value to both agents and clients.

Broker Joe Martinez has over 25 years of investment real estate experience ranging from basic residential acquisitions to large scale subdivision land development. He and his long time clients have invested in all the major real estate markets in Texas, focusing on the San Antonio, DFW, and Austin markets. Joe's son, Juston, is the managing partner and designated broker of Texas Ally Real Estate Group, LLC. Juston has been licensed since 2008 developing a diverse collection of investment acquisition tactics and a variety of residential exit strategies. Both brokers have extensive experience in the owner finance branch of real estate.

# Staff

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**Juston Martinez**

**Managing Partner, MLS Broker**

**Joe Martinez**

**Non-MLS Broker**

**Amanda York**

**Director of Operations**

**Christine Cruz**

**Office Manager**

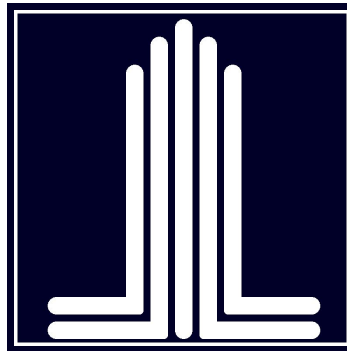
**Mariela Aberbuj**

**Executive Assistant**

# Introducing

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Your New Logo:





Our Company Website:

<http://www.texasally.com/>

## Accessing the Real Estate Boards

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Click the links below for instructions on how to access the various real estate boards Texas Ally is a part of.

Member REALTOR/MLS Board Info:

[https://drive.google.com/file/d/1D\\_JyR8HZ4uoV7TJYM-GNJvvB3N12CmiB/view?usp=sharing](https://drive.google.com/file/d/1D_JyR8HZ4uoV7TJYM-GNJvvB3N12CmiB/view?usp=sharing)

[TREC Relationship Management Tool User Guide](#)

# Documents and info for Submission

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Please complete your onboarding in BrokerSumo (an invite will be emailed to you). You will be filling out and submitting a Real Estate Independent Contractor Agreement, Credit Card Authorization Form, and W9 form within that tool. You will also be setting up your account, uploading a photo of your driver's license, and inputting your credit card info. If funds are sent to Texas Ally on your behalf, please ensure that your ACH info is inputted so you can be paid by direct deposit. Your change of Broker sponsorship with TREC and MLS Board Transfer must also be completed.

# Transaction Management/Checklist

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For each Sale or Lease Transaction, please use the below checklists as guides for smooth processing of commissions and recording of closed deals. Please request approval for CDAs **AT LEAST 3 whole business days before** the scheduled close date to ensure it is approved and sent on time.

- TRANSACTION MANAGEMENT in [BrokerSumo](#) (backoffice software tool)
  - MLS Listings will sync (as long as agent name matches exactly (MLS=BrokerSumo)) and auto-populate some fields
  - Fill in remaining needed fields
  - Update Commission Plan if needed based on Lead Origination
    - Internal team will override this if labeled incorrectly
  - Add applicable task list
    - The greyed out tasks require a document to be uploaded to transaction before checking off
  - Add Title Company information
  - Create Disbursement
    - Net Amount Due to Brokerage should have the comment “Mail payment to Texas Ally Real Estate Group at 1301 S Interstate 35, Suite 314 Austin, TX 78741”
    - Net Amount Due to “Agent Name” should have the comment “Cut directly to Agent” if applicable
      - Lease commissions must be mailed to the office
    - Send Email request for approval through BrokerSumo

Transaction Status

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Complete this transaction by finishing and checking off the tasks below.

**Progress:** 
25%

**Task Checklist:**

- ? Disbursement Created Email request for approval
- ? Disbursement
- ? Brokerage Paid
- ? Agent(s) Paid

- 
- And send to...

Email Request

Email request for approval to: **Select Broker**

- Juston Martinez (amanda@texasally.com)
- Rizi del Rosario (rizi@texasally.com)
- Karina Perez (karina@texasally.com)
- CDA Approval Request (cda@texasally.com)**

Commission Disburse Activity

## LEASE TRANSACTIONS

- Upload All documents associated with the transaction in BrokerSumo. These documents will include all or most of the following:
  - [Residential Lease Listing Agreement](#)
  - Signed [IABS Form](#)
  - Approved [Lease Application](#)
  - Executed [Lease Contract](#)
  - [Agreement Between Brokers For Residential Leases](#)
  - Copy of [Lease Invoice](#)
  - Applicable [W9s](#) (if paying/sharing commission with another agent)
    - If Listing Agent, acquire a completed W9 form from Locator Agent's Brokerage
- Create and request approval for CDA in BrokerSumo
- If W-9 is requested by the company, please provide us with their full company information: Name, Address, Phone number. W-9 will be provided signed, after requested with the proper information.

## SALE TRANSACTIONS

- Upload All documents associated with the transaction in BrokerSumo. These documents will include all or most of the following:
  - Signed [Listing Agreement](#)

- Buyer's Rep Agreement
  - [TAR](#)
  - [Texas Ally Branded](#)
- Signed [IABS Form](#)
- [Seller's Disclosure Notice](#)
- Fully Executed and receipted [Sales Contract](#)
- [Amendments/addendums](#) to Contract
- Applicable [W9s](#) (if paying/sharing commission with another agent)
- Create and request approval for CDA in BrokerSumo
- Once Sale is closed, upload a Signed Closing/Master Statement

# How to Use Slack

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A helpful guide to using the Slack application can be found here:

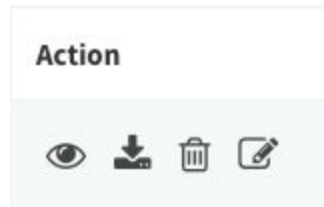
[Getting Started for New Users](#)

[Signing into Slack](#)

[Join Channels:](#)

Some channels you should join: General, Random, and Leads

You will also find the Slack PDF Guide in BrokerSumo under Office Documents> SOPs, Resources, and Guides> Slack (Team Communication Tool) Guide. You can view in your browser (eye icon) or download (down arrow) from the Action field.



## Associated Boards

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[Windfall Group Savings Program](#)

**Austin Board of Realtors (ABOR)**

[Join](#) / [Member Benefits](#) / [SiteMap](#)

**MetroTex Association of Realtors**

[Join](#) / [Member Benefits](#) / [Status Change Form](#)

**San Antonio Board of Realtors (SABOR)**

[Join](#) / [Member Benefits](#) / [Useful Links](#)

**Houston Association of Realtors (HAR)**

[Join](#) / [SuperCenter](#)

**Temple-Belton Board of Realtors (TBBOR)**

[Join](#) / [Shop](#)

**Arlington Board of Realtors (ARBOR)**

[Join](#)

**Waco Association of Realtors (WAOR)**

[Join](#)

**Corpus Christi Association of Realtors (CCAR)**

[Join](#) / [Member Benefits](#)

**Four Rivers Association of Realtors (FRAR)**

[Join](#) / [Member Benefits](#)

**Greater El Paso Association of Realtors (GEPAR)**

[Join](#) / [Member Benefits](#)

**Bryan-College Station Regional Association of Realtors (BCSRAOR)**

[Join](#)

**Laredo Association of REALTORS (LAR)**

[Join](#)

**Brownsville/Padre Island Board of REALTORS (BBOR/SPI)**

[Join](#)

Wichita Falls Association of REALTORS (WFAR)

[Join](#)

Texarkana Board of REALTORS (TBOR)

[Join](#)

Ft. Hood Association of REALTORS (FHAAR)

[Join](#)

Texas Association of Realtors (TAR)

[Discount Cards](#)

[Member Benefits](#)

## Contact Us

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Please feel free to contact us anytime with questions, concerns, feedback, or suggestions you may have for us.

Phone: 512.763.ALLY (2559)

Fax: 512.519.4004

Email: [mail@texasally.com](mailto:mail@texasally.com)