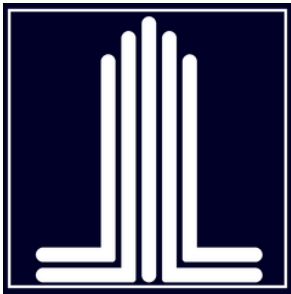


TEXAS ALLY *In The Loop* 2024 Edition



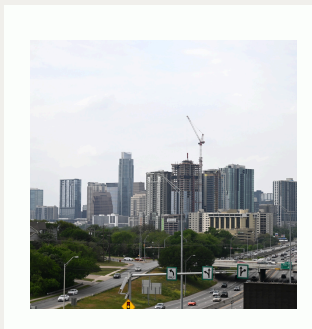
*Remember you can find links to all these forms in the **Agent Portal**.*

Complete the information in each link and we'll send you the requested documentation shortly.



We're excited to reconnect with you through our first newsletter in a while. Our goal is to touch base, provide you with valuable information for your daily activities, and offer helpful reminders to streamline your transactions.

We want to ensure you have all the tools and information you need to succeed. Remember, we're here to support you every step of the way. If you have any questions or need further assistance, don't hesitate to reach out.



Don't have your profile on the Texas Ally website yet?

Complete this form and we'll get it done.



If you already do and you need to update your information, email Yamila at yamila@texasally.com.

W9

W9
request form

RL

Rebate Letter
request form

QB

Quickbooks invoice
request form

Did you know?

You can send us information about your new listings, just-closed deals, upcoming open houses, and glowing reviews from your clients! We'd love to share your successes and events on our social media platforms. It's a great way to boost your visibility and reach a wider audience.



If you have something to share, please email us at socialmedia@texasally.com. And if you haven't already, make sure to follow us! Stay connected and see what your fellow agents are up to.

Many agents have been reaching out with questions regarding the NAR settlement. Please [click here](#) to access a fact sheet.

For now, as a brokerage the suggestion is: Before even showing a particular property, have a signed Representation Agreement signed with your client, confirm the commission amount being offered by the listing agent, and get an Agreement Between Brokers signed.



Transaction Management Reminders



agent@texasally.com

LOGIN FORGOT PASSWORD?

- Add transactions to Brokersumo within 3 days of execution
- Transactions without commission must also be added to Brokersumo and sent for review/approval
- Creating a disbursement does not automatically submit it for approval, you need to click on the envelope in "Transaction info" tab
- Submit your CDAs at least 5 business days before closing, TA will approve CDAs up to 2 weeks prior

- Representation Agreement and IABS are TA required docs
- Upload Closing Statement so we can close out the transaction in Brokersumo
- Checks are collected and deposited on Wednesdays only
- Friday is Payday! Set up your Brokersumo Direct Deposit (ACH) and make sure everything is ready for you to receive your commission

Cancel **Save Changes**

Transaction Status

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

Progress: ? 25%

Task Checklist:

- Disbursement Created
- Disbursement Approved/Sent to Escrow
- Brokerage Paid
- Agent(s) Paid

Property Info

Add Complete Address

Find attached Transaction Management video and a cheatsheet you can print to have all this information with you!