

# In The Loop

CHRISTMAS EDITION

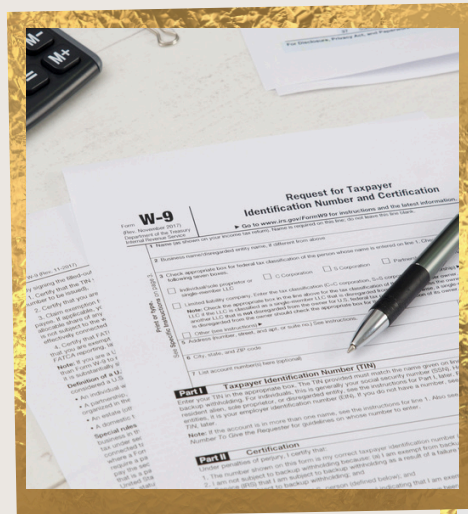


Can you believe it's December? We're all asking the same question! This year has flown by, and the Texas Ally team hopes it's been a successful and productive one for you.

As we close out the year, we're here with our latest newsletter to share some updates and final reminders to help you finish the year on the right foot. Let's tackle these tasks together before the holiday season is in full swing!

**Let's Wrap Up the Year Strong!**

REMEMBER!  
ALL W9s REQUESTED  
SHOULD BE UPLOADED  
TO THE TRANSACTION  
IN BROKERSUMO



152,233	
96,934	
242,674	
\$4,523,568	\$4.1
\$449,270	\$252
2,722,544	2,475,
253,614	294,2
923,140	912,49
4,348,568	3.92

TO CLOSE A TRANSACTION PLEASE  
UPLOAD THE CLOSING STATEMENT

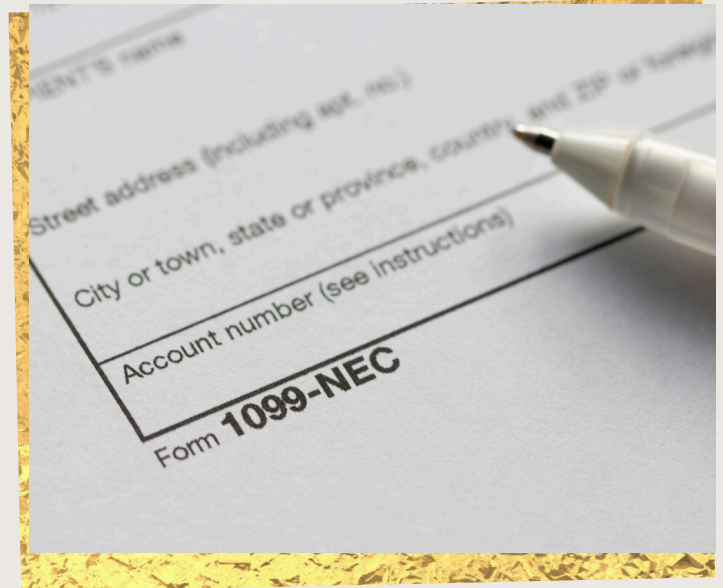


# Important Reminder: Prepare for 1099 Season

As we gear up for tax season, it's crucial that **all documentation** for your closed transactions this year is **completed** and submitted. This will help us ensure everything is accurate and ready **for 1099 preparation**.

If you have any outstanding transaction documents, please take a moment to finalize them now. This is a necessary step to avoid any delays or complications.

Additionally, if your personal information has changed, please let us know so we can update our records accordingly.



*1099 season is coming!*



We appreciate your prompt attention to this matter—let's make the process smooth and stress-free for everyone! If you have any questions or need assistance, feel free to email us at [cda@texasally.com](mailto:cda@texasally.com) or call the office at 512-763-2559.

# REMEMBER!



Commission payments are initiated on **Friday Payday**, but only if:



Your CDA is approved



Funds have settled in TA escrow



You're set up for BrokerSumo Direct Deposit (if you haven't done this yet, let's fix that!)



PRO TIP OF THE MONTH: CREATE A TRANSACTION FOLDER FOR EACH DEAL WHERE YOU SAVE EVERYTHING – EMAILS, TEXTS, DOCUMENTS. YOU'LL NEED TO KEEP THOSE FOR 5 YEARS, AND TRUST US, YOUR FUTURE SELF WILL THANK YOU!

## Need Help? We've Got You:

CDA questions?



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

Stuck on something?



Call us: 512-763-2559

Looking for forms?

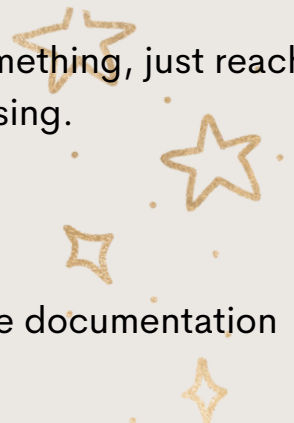


Hit up the agent portal

Remember, we're all in this together! If you're ever unsure about something, just reach out. Better to ask questions early than scramble at closing.

Stay awesome out there!

P.S. - Save yourself some headaches: When in doubt, upload more documentation rather than less. You can never be too thorough!



# Texas Ally Christmas Party

2023  
Christmas  
party!



It's that time of year again! The Texas Ally Christmas Party will be held early this year on Thursday, December 5th, so be sure to mark your calendars.

We'd love for you to join us! Please RSVP as soon as possible so we can plan for an amazing celebration. This is one of our favorite opportunities to connect with our agents, share some holiday cheer, and catch up with everyone.

We're looking forward to a wonderful time together and hope to see you there!



DON'T FORGET TO RSVP!

## White Elephant

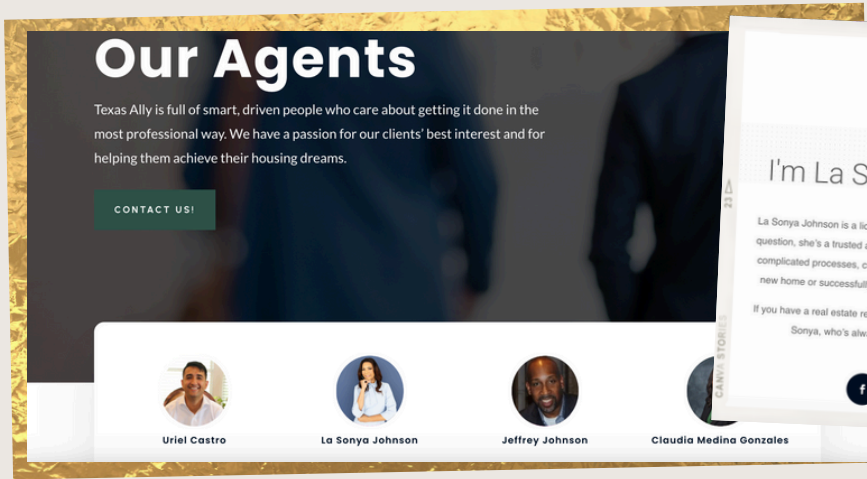
If you would like to participate, please bring a gift (\$20-\$30) to exchange.

## Toy Drive

Please bring a toy (\$15-\$25) to donate to Operation Blue Santa and be entered into a raffle to win \$200!



WE WOULD LOVE FOR YOU  
TO JOIN!



*Sign up!*

## Get Ready for 2025: Update Your Texas Ally Web Profile!

We want to help you stand out in the coming year! Complete this **form**, and we'll create your web profile on the Texas Ally website. You can also update your profile information and upload a new profile picture.

Don't miss the opportunity to make a great impression—let's get your profile ready for 2025!



# Holiday Office Hours: Plan Ahead

As we approach the holiday season, please note our office will be **closed** on the following dates:

**December 25, 26, and 27 for Christmas**

**December 31 and January 1 for New Year's**

We kindly ask that you plan your work accordingly and reach out for any assistance you may need before these dates. Our team is here to help, and we want to ensure everything runs smoothly for you during the holidays.

Thank you and Happy Holidays!

The Texas Ally Team