FREE GUIDE

How to Switch Real Estate Brokerages Without Losing Deals

Changing brokerages is mostly paperwork and timing. Plan it well and your clients barely notice. This is general guidance, so always check your own agreement and your state's rules.



1. Read your current agreement first

Look for notice periods, fees owed on departure, and what happens to pending transactions and listings. Listings are usually held by the brokerage, not the agent, so know the rules before you announce anything.

2. Make a list of everything in progress

- ✓ Pending transactions and their expected closing dates
- ✓ Active listings and listing agreements

- ✓ Buyer representation agreements
- ✓ Referral agreements and any fees you're owed

3. Time the move

Many agents move between closings to keep things simple. If you have pending deals, ask both brokerages how they'll be handled before you switch.

4. Transfer your license

License transfers go through your state's licensing agency: the Florida DBPR in Florida and the Illinois IDFPR in Illinois. Your new broker can walk you through the steps.

5. Move your marketing and contacts

- ✓ Export your personal contact list and keep it up to date.
- ✓ Update your bio, email signature, social profiles and business cards.
- ✓ Set up your new website and lead routing before announcing.

6. Tell your clients, simply

A short, personal message works best: what's changing, what isn't, and how to reach you. Most clients care about you, not the logo.

Thinking about Kap Rate Living? **Talk to your state's broker**. Every conversation is confidential.