

URBAN MARKETING EDGE

FOR BROKERS AND OWNERS

The New Agent Recruiting Playbook

Find, attract, onboard and keep new agents.
A working system your office can run in-house.

01

Define

02

Find

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Attract

04

Interview

05

Onboard

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Retain

Worksheets, message templates, a 90-day onboarding plan and a recruiting scorecard inside.

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START HERE

How this playbook works

Six stages, one system, built to run from your office.

Recruiting runs best as a system with a weekly rhythm, the same way listing marketing does. Every stage here is something you can put to work this month. In the templates, swap in your own details anywhere you see a highlighted word like **Office Name**.

Stage	What you build	Page
01 Define	Your ideal new agent profile, your first-year offer, a plain-language fee summary, and the marketing walk-through that sets your office apart	3
02 Find	A source map of where new agents come from and an annual recruiting calendar	7
03 Attract	A careers page, a 12-week recruiting content plan and ready-to-post captions	9
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Who owns what

Role	Owns
Broker or owner	The offer, the career conversation, the final yes, the monthly check-in
Office admin or coordinator	Outreach lists, follow-up reminders, onboarding paperwork, the scorecard
Mentor agents	Ride-alongs, first appointments, weekly 30-minute check-ins for 90 days
Every agent in the office	Referrals, recruiting posts from their own profiles, welcoming new agents

Why the effort pays back

The typical Realtor has been with their current firm a median of **6 years**, according to the NAR 2026 Member Profile. An agent you recruit, train and keep is a relationship measured in years, so the time you put into the first 90 days is spread across all of them.

STAGE 01

Define

Know who you are recruiting and what they get when they say yes.

A clear picture of the right new agent makes every other stage faster. Start with traits you can observe, then build your offer around what a new agent needs in year one.

Your ideal new agent profile

Score each trait from 1 to 5 for every candidate. Decide your minimum total before you start meeting people, and keep the same list for everyone.

Trait	What it looks like	How you find out
Clear reason	Can say in one or two sentences why they got licensed and what they want from year one	Career conversation, question 1
Time to commit	Has a realistic weekly schedule for lead generation, training and appointments	Career conversation, question 3
A network	Can name the first 50 people they will tell, from work, community, school or past jobs	Ask them to list 10 names on the spot
Follow-through	Replies on time, shows up on time, sends what you asked for	Watch the process from first message to meeting
Coachability	Asks questions, takes feedback in the room, tries the suggestion	Run a two-minute role play and give one note
Service background	Has worked with customers, sales, hospitality, teaching or any role with follow-up	Resume or background conversation

Your first-year offer

New agents compare brokerages on what happens after they join. Fill in this grid with specifics. Anything you cannot fill in is the next thing to build.

What they get	Your specifics
Training	Days, times and topics for the first 90 days
Mentorship	Who mentors, how often they meet, how the first deals are shared
Deal access	Open houses, floor time, overflow or referral leads, team opportunities
Marketing support	Announcement kit, templates, listing marketing, headshots, signs, and how fast each one turns around
Tools	CRM, transaction management, MLS, website, email platform
People	Office hours, team events, who they can call on a Sunday afternoon

Write your one-sentence offer

"At **Office Name**, a new agent gets **training**, **mentorship** and **support** in their first 90 days, so they can **outcome, such as write their first contract**."

Use this sentence on your careers page, in your first-contact messages and at the start of every career conversation.

The one-page fee summary

Put every cost on one page in plain language. Agents who understand the numbers before they sign are the agents who stay. Hand this out at the end of every career conversation.

Item	What to write	Example format
Commission split	The split and when it changes	70/30 until amount paid to the brokerage, then split
Cap	Whether there is one and the reset date	Amount per year, resets on date
Monthly fee	Desk, tech or admin fee and what it covers	Amount per month, covers tools
Transaction fee	Per-closing fee and who pays it	Amount per closed side
E&O insurance	Cost and how it is billed	Amount per transaction or per year
Association and MLS	Paid by the agent directly or through the office	Paid directly by the agent to the board and MLS
Marketing	What the office provides and what the agent pays for	Office provides items ; agent pays for items
Mentor share	Share on first deals, if any, and for how many	Percent on the first number closed transactions

Questions new agents ask most, answered before they ask

- How soon will I be on my first appointment?
- What does a normal week look like for a new agent here?
- Who helps me write my first offer?
- What do I pay before my first closing?
- Can I join a team later, and how does that change my split?
- What happens if I decide to leave?

Write a short answer to each question and put the answers on your careers page. It saves time in every career conversation and shows candidates how openly the office works.

Marketing support is the promise they notice

Splits get an agent's attention. What they picture next is their own week: the listing that needs a launch, the closing that needs a post, the farm that needs a mailer. Every hour of that lands on the agent unless the office hands them a system, which is why a brokerage with real marketing support recruits on something no split can copy.

What the research says agents weigh

Asked what mattered most in choosing a brokerage, agents put economics first at 64 percent, culture and values second at 55 percent, and technology and tools third at 38 percent. Nearly a third of agents spend more than \$20,000 a year of their own money running their business. (Real Brokerage survey of 400 agents, December 2025.)

What firms most often provide is transaction technology: electronic contracts at 73 percent, comparative market analysis tools at 71 percent and e-signature at 70 percent. (NAR 2025 Profile of Real Estate Firms.) Useful tools, and none of them put a listing in front of a buyer.

Branding recruits the agents you want

Recruiting marketing works like listing marketing: it attracts whoever recognizes themselves in it. An office that publishes careful, consistent work attracts agents who want to work that way, and the agents who only want the highest split keep scrolling. That is a filter doing your work for you, so publish the standard you want to hire against.

What you publish	Who it brings in
Listing launches with real photography, floor plans and neighborhood detail	Agents who want their listings marketed properly and will follow a process to get it
Agent milestones, first closings and client wins	Agents who want to be seen and will send you the material to work with
Training days, working sessions and office events	Agents who want to learn and will show up for it
Market updates and neighborhood content under agent names	Agents building a long-term local business rather than chasing one deal
Community sponsorships and local partnerships	Agents who already have roots in your market

One standard, one system

Every piece above is produced from the same brand system: one set of templates, one content calendar, one launch sequence. That is what makes marketing support a promise you can keep for twenty agents instead of a favor you do for three.

The marketing walk-through

Do not tell a candidate you have marketing support. Open a laptop and show them, then say what they would get and when. Ten minutes of this does more than any recruiting brochure.

Show them	Then say
The brand kit: templates, colors, fonts, story frames	"This is what your posts look like on day one. You do not build any of it."
A finished listing launch, start to finish	"Every listing in this office gets this. Just Listed through Just Sold."
The monthly content calendar	"You get the month's themes on the first, already written."
An agent page on your website with bio and listings	"Yours goes live in your first week."
A closing post and a review card from last month	"Every closing you have gets both, the same week."
The announcement kit for a newly licensed agent	"This is how we tell the market you are here."
Print: flyers, door hangers, business cards, signage	"Ordered through the office, on brand, no design fees to you."
One agent's finished month of marketing	"This is a normal month for an agent here. How does it compare?"

Put it in writing on the offer

Candidates compare what they can hold. Add a marketing line to your first-year offer and say what is produced, how often and how fast: **number** posts a week, a launch kit for every listing, a closing post within **number** business days, blogs each month under their name, and who they send material to.

The question that closes the gap

Ask this near the end of the career conversation: "If your marketing was already built for you every month, what would you do with the time?" Their answer is the plan you hold them to in the first 90 days, and it is the line you repeat when you check in at day 30.

Find

Where new agents come from and how to reach each source.

Many new agents choose a brokerage in the weeks around their licensing exam. The offices that recruit steadily show up in the places people are before, during and right after that window.

Source	How to use it	Cadence
Pre-licensing schools	Offer to teach a practical session for students, such as what the first 90 days in the business look like. Leave a one-page guide with your contact details.	Each class cycle
Newly licensed agents	Many state real estate commissions offer a public license lookup, and some publish downloadable licensee files. Reach out within the first 30 days of licensure.	Weekly or monthly
Your agents' networks	Ask every agent each quarter: who have you talked to about getting a license? Keep a shared list and follow up personally.	Quarterly
Your sphere and past clients	Past clients and friends who say they have thought about real estate. Add a line to your newsletter inviting them to a career night.	Monthly
Open house visitors	Some visitors ask what the job is like. Train agents to hand over a career night invite card.	Every open house
Career changers	Chamber of commerce events, business networking groups, veteran transition events and community college career fairs.	Monthly
Your website and social media	A careers page plus recruiting posts from the office and agent profiles (see Stage 03).	Weekly
Career nights	A 60-minute evening at your office: what the job is, how licensing works, how your first 90 days work, questions.	Quarterly

Before you call or text a list

Treat recruiting outreach like any other marketing. Texts sent through an automated platform generally need prior consent under federal TCPA rules, and recruiting emails should carry your physical address and a working unsubscribe. A personal email or a call from the broker is the simplest place to start. See the compliance check on page 20.

Annual recruiting calendar

Plan four career nights a year and build your outreach around them. Adjust the timing to your market and to local licensing class schedules.

Quarter	Focus	Career night theme	Outreach push
Q1 (Jan to Mar)	New year career changers	Is real estate the right career for you?	Sphere newsletter, social media, networking groups
Q2 (Apr to Jun)	Spring market energy	A week in the life of a new agent	Pre-licensing schools, open house visitors
Q3 (Jul to Sep)	Summer schedule changes and fall starts	Your first 90 days, step by step	Newly licensed outreach, community college fairs
Q4 (Oct to Dec)	Planning for next year	Build your first-year business plan	Agent referrals, past clients, year-end events

Career night run of show (60 minutes)

Minutes	Segment	Who leads
0 to 10	Welcome, introductions, why each person came tonight	Broker
10 to 25	What the job actually involves: lead generation, appointments, contracts, closings	Broker
25 to 40	Panel of two or three agents: one newer, one experienced. Their first year, in their words	Agents
40 to 50	How licensing works in your state and how your first 90 days work here	Broker
50 to 60	Questions, then book one-on-one career conversations before people leave	Broker and admin

Career night checklist

- ☐ Invitation posted four weeks out, reminder one week out and the day before
- ☐ Sign-in sheet or form with name, email, phone and licensing status
- ☐ Fee summary and first-year offer printed for every guest
- ☐ Calendar open to book career conversations on the spot
- ☐ Thank-you email to every guest within 24 hours

Attract

Show candidates what working at your office looks like.

People who are choosing a brokerage look you up before they reply. A clear careers page and a steady run of recruiting posts give them the answers before the first conversation.

Careers page checklist

- ☐ **Who the office is for.** One short paragraph describing the agents who do well with you.
- ☐ **Your one-sentence offer** from Stage 01, near the top of the page.
- ☐ **The first 90 days**, laid out as three short blocks: foundation, activity, first deals.
- ☐ **The training calendar**, with days and topics.
- ☐ **Real agent stories**, with written permission: a milestone, a quote, a photo.
- ☐ **The marketing an agent gets**, shown as finished pieces: a launch kit, a closing post, a template set.
- ☐ **How agents are paid**, either the fee summary or a plain statement that you share it at the first meeting.
- ☐ **Photos of your office and your people**, not stock images.
- ☐ **Frequently asked questions** from page 4.
- ☐ **One clear next step:** book a career conversation or register for the next career night.

12-week recruiting content plan

One recruiting post a week from the office profile, shared by agents to their own profiles. Rotate these themes and repeat the cycle each quarter.

Week	Post theme	Week	Post theme
1	Behind the scenes at weekly training	7	A newer agent's first listing, with permission
2	The marketing an agent here gets	8	Office event or community volunteer day
3	Career night invitation	9	Question of the week: what do new agents do in week one?
4	A day in the life of a newer agent	10	Career night reminder
5	An agent's first closing, with permission	11	The tools every agent here uses
6	Answering a common question about the career	12	Recap: the quarter in milestones

Ready-to-post recruiting captions

Training day

Tuesday training at **Office Name**. This week our newest agents practiced listing presentations with experienced agents in the room giving live feedback. Every new agent here gets weekly training like this in their first 90 days.

Thinking about a career in real estate? Send us a message and we will walk you through how it works.

First closing milestone

Congratulations to **Agent Name** on closing their first transaction, **number** weeks after joining **Office Name**. From the first open house to the closing table, **Mentor Name** was right there as a mentor.

This is what our 90-day start program is built for. Ask us how it works.

Career night invitation

Curious about a career in real estate? Join us at **Office Name** on **date** at **time** for a relaxed evening: what the job involves, how licensing works, and what the first 90 days look like, straight from agents who have done it.

No experience needed. Send us a message to save your seat.

A day in the life

What does a newer agent actually do all day? **Agent Name** gave us a look: morning lead generation calls, a buyer consultation before lunch, an afternoon of showings and an evening open house follow-up.

Every day looks a little different, and that is part of why our agents love it. Want to see if this career fits you? Let's talk.

Keep recruiting posts accurate

Share real milestones with written permission, and leave out income promises, income averages without a source, or guarantees of leads. Your state's advertising rules for brokerage identification apply to recruiting posts too.

Interview

From the first message to a signed agreement.

Personal outreach from the broker works. Keep messages short, specific and focused on the next step, which is always a conversation.

Email to a newly licensed agent

Subject: Congratulations on your license, **First Name**

Hi **First Name**, congratulations on getting your real estate license. That is a real accomplishment.

I am **Your Name**, broker at **Office Name** in **City**. Every new agent who joins us goes through a 90-day start program: weekly training, a mentor on your first deals and a marketing launch kit on day one.

If you are still deciding where to place your license, I would be glad to walk you through how our first 90 days work. Would a 30-minute coffee next week work for you?

Your Name
Phone

Email to a pre-licensing student

Subject: Your next step after the exam, **First Name**

Hi **First Name**, it was good to meet you at **school or class name**. You asked great questions about what happens after the exam.

Here is our one-page overview of how new agents start at our office. Take a look when you have a minute, and if you would like to talk through your options before you test, I am happy to meet.

Your Name
Phone

Text after an agent referral (with permission to reach out)

Hi **First Name**, this is **Your Name** with **Office Name**. **Agent Name** mentioned you are getting into real estate and said it was OK for me to reach out. Congratulations. Would you like to grab coffee this week and talk about how the first year works?

Social media direct message

Hi **First Name**, I saw you just got your license. Congratulations. I lead **Office Name** here in **City**, and we love helping new agents get off to a strong start. If you are open to it, I would be glad to share what our first 90 days look like.

Follow-up cadence

Most decisions take more than one touch. Put these dates on the calendar the day you send the first message. Stop when they say yes, say no, or ask you to stop.

Day	Touch	What to send
1	First contact	Email or referral text from the previous page
3	Value	Your first-year offer or a link to your careers page
7	Personal	A short call or voicemail from the broker
14	Invitation	Career night invite or an open house they can shadow
30	Check-in	"Where did you land? Happy to answer any questions either way."
90	Door open	A note that your door stays open, plus a training topic they can attend

The 45-minute career conversation

Minutes	Segment	What happens
0 to 5	Welcome	Thank them, share the agenda, set the goal: both of you decide if this is a fit
5 to 20	Their goals	Interview questions below. Listen more than you talk
20 to 30	How the office works	Your one-sentence offer, the training calendar, mentorship, a normal week
30 to 38	The numbers	Walk through the fee summary line by line. Leave a copy with them
38 to 45	Next step	Invite them to shadow an open house or attend training, and set a decision date

Interview questions

1. What made you decide to get your license?
2. What does a successful first year look like for you?
3. How many hours a week can you give real estate right now, and when?
4. Who are the first ten people you will tell you are in real estate?
5. Tell me about a time you had to follow up many times to get a result.
6. How do you learn best: a class, one-on-one, or doing it alongside someone?
7. Have you planned for the time between starting and your first closing?
8. What would you need from us in your first 30 days?
9. What would make you leave a brokerage?
10. What questions do you have about our fees and splits?

Keep every conversation consistent and fair

Ask every candidate the same core questions and score them on the same traits. Keep these topics out of the conversation entirely: age, race, color, religion, national origin, sex, sexual orientation, gender identity, marital or family status, pregnancy or plans for children, disability or health. If a candidate raises one of these, return to the job itself.

Candidate scorecard

Score within 24 hours of the conversation while it is fresh. Compare against the minimum total you set in Stage 01.

Trait	1	2	3	4	5	Notes
Clear reason						
Time to commit						
A network						
Follow-through						
Coachability						
Service background						
Total						Minimum to move forward:

From yes to signed

- ☐ Send the independent contractor agreement, policy manual and fee summary together
- ☐ Offer a 20-minute call to walk through the agreement before they sign
- ☐ Set the start date and the first training they will attend
- ☐ Assign a mentor and introduce them by email the same day
- ☐ Share the before-day-one checklist on the next page
- ☐ Announce the new agent to your office with a short welcome note

If a candidate says no

Thank them, ask what made the decision, and add their answer to your recruiting notes. Send the day 90 note from the follow-up cadence. Agents who start elsewhere often look again after their first year.

STAGE 05

Onboard

The first 90 days, planned before day one.

A new agent's first weeks set their habits. When the schedule, the mentor and the marketing are ready before they walk in, they can spend their energy on clients from the start.

Before day one

Paperwork and license	Accounts and tools	Marketing launch kit
☐ License placed with the brokerage	☐ Brokerage email address	☐ Professional headshot
☐ Independent contractor agreement signed	☐ CRM login and training scheduled	☐ Short bio for website and social profiles
☐ W-9 on file	☐ MLS and lockbox access	☐ Email signature in brokerage branding
☐ Association and MLS applications submitted	☐ Transaction management system	☐ Business cards ordered
☐ E&O insurance in place	☐ Shared drive and template library	☐ Agent page live on your website
☐ Policy manual acknowledged	☐ Office calendar and training invites	☐ "I'm licensed" post and sphere email ready

Week one schedule

Day	Morning	Afternoon
Monday	Welcome, office tour, meet the team, systems setup	Lunch with mentor; set up CRM and load contacts
Tuesday	Weekly office training	Write their sphere list: at least 100 names with a category for each
Wednesday	Contracts overview: buyer agreement, offer, listing agreement	Shadow a showing or buyer consultation with mentor
Thursday	Lead generation block: first calls to sphere, with mentor nearby	Preview three active listings in their target area
Friday	Send "I'm licensed" email and post	Week review with broker: wins, questions, next week's plan

The 90-day plan

Share this plan on day one and review it with the new agent at days 30, 60 and 90. Measure the activities, since activities are what the agent controls.

Days 1 to 30: Foundation	Days 31 to 60: Activity	Days 61 to 90: First deals
Complete orientation and systems training	Ten scheduled hours of lead generation each week, tracked in the CRM	Goal: one signed buyer representation agreement or listing agreement
Load at least 100 contacts into the CRM	Host two open houses; follow up with every visitor within 24 hours	Write a first offer with mentor review
Send the "I'm licensed" email and post; personal texts to the top 50 contacts	Lead a first buyer consultation with the mentor in the room	Run a listing presentation role play for the broker
Shadow two buyer consultations and one listing appointment	Post three times a week from the office content plan	Review activity numbers with the broker
Co-host a first open house	Role play the listing presentation twice	Write a 12-month business plan with the broker
Attend every weekly training	Attend every weekly training	Attend every weekly training

Activity tracker for the weekly check-in

Activity	Weekly target	Wk 1	Wk 2	Wk 3	Wk 4
Hours of lead generation	10				
Conversations with contacts	25				
New contacts added to CRM	10				
Appointments set or shadowed	2				
Open houses hosted	1 every two weeks				
Social posts published	3				

Set the targets that fit your market and each agent's schedule. The point is a number that is written down and reviewed every week.

The "I'm licensed" email to their sphere

Subject: Some news from me, **First Name**

Hi **First Name**, I wanted you to hear it from me: I am now a licensed real estate agent with **Office Name** in **City**. I am backed by a team of experienced agents and I would love to be the person you call with any real estate question, for you or someone you know. Thank you for being in my corner.

Agent Name

Phone

The mentor structure

Pair every new agent with an experienced agent for their first 90 days, or their first few transactions. Put the arrangement in writing before the first appointment.

Element	How to set it up
Who mentors	Agents with steady production who want to teach. Ask them; do not assign it as a favor
Match	Pair by schedule and market area first, personality second
Weekly check-in	30 minutes, same day and time each week, with the activity tracker open
Ride-alongs	Mentor attends the first buyer consultation, first listing appointment and first offer
Compensation	A written share on the new agent's first transactions, with the percent, the number of deals and how it is paid
End point	At day 90 or after the agreed number of closings, whichever the agreement states
Mentor support	A 30-minute monthly mentor meeting with the broker to compare notes

Weekly mentor check-in agenda (30 minutes)

Minutes	Topic
0 to 5	Wins from the week, big or small
5 to 15	Activity tracker: what got done and what got in the way
15 to 25	One skill: a script, a contract section, a pricing conversation or a follow-up plan
25 to 30	Next week's three priorities, written down

New agent marketing, month one

A new agent who is visible from week one starts conversations faster. Give every new agent these five pieces during their first month:

- The "I'm licensed" post and sphere email
- A 30-day starter set of 12 posts drawn from the office content plan
- An open house invitation template and a visitor follow-up email
- A buyer consultation one-pager and a seller consultation one-pager in brokerage branding
- A first-closing celebration post template, ready for the day it happens

Retain

Keep the agents you worked hard to bring in.

Retention starts on the day an agent signs. Regular attention from the broker, visible recognition and an early conversation when something changes keep new agents growing with you.

Monthly broker check-in (15 minutes)

- **What is going well?** Let them lead with a win.
- **Numbers.** Review the activity tracker and pipeline together.
- **What is in the way?** One obstacle you can help remove this month.
- **Growth.** One skill or training to focus on next.
- **Commitment.** One thing each of you will do before the next check-in.

Milestones to celebrate

Milestone	How to recognize it
First signed agreement	Shout-out at weekly training
First listing	Office social post and a listing launch with the whole office sharing
First closing	First-closing post, a handwritten note from the broker and a moment at the next team meeting
Fifth closing	Feature on the careers page with permission
One-year anniversary	Anniversary post, a lunch with the broker and the 12-month stay interview

Stay interview questions

Ask these at six months and twelve months, one-on-one, and take notes. Act on at least one answer and tell the agent what you changed.

- 1. What do you look forward to most when you come into the office?
- 2. What is the one thing that would make your job easier?
- 3. What training would help you most in the next six months?
- 4. Is there anything that would make you think about leaving?
- 5. What should we start doing, stop doing and keep doing?
- 6. Who else would do well here?

Early signals and what to do

Signal	What to do this week
Missed two trainings in a row	Personal call from the broker; ask what changed in their schedule
No CRM activity for 14 days	Mentor check-in focused on a simple restart plan for the next seven days
Skipped mentor check-ins	Broker, mentor and agent meet together to reset the plan
No appointments by day 60	Add open houses and shadowing; review the sphere list together
Asking about other offices	Stay interview now, not later

Turn retention into recruiting

Question six is the start of your next referral. Agents who are glad they joined are the most credible recruiters you have. Thank every referral personally, whether the candidate joins or not.

MEASURE

The recruiting scorecard

Review monthly. Adjust quarterly.

Track a small set of numbers every month. Over two or three quarters, they show which sources bring agents who stay and produce.

Metric	How to count it	This month	Last month
First contacts sent	Every first-contact message or call to a new candidate		
Career conversations held	Completed 45-minute meetings		
Career night attendance	Guests who attended, and how many booked a meeting		
Agents signed	Signed agreements, listed by source		
Conversation to signed rate	Agents signed divided by career conversations		
90-day activity rate	New agents meeting their weekly activity targets		
First agreement within 90 days	New agents with a signed buyer or listing agreement by day 90		
First closing within 6 months	New agents with a closed transaction by month six		
12-month retention	Agents still with the office one year after joining		
Top source	The source that produced the most agents still active at 12 months		

Your 30-day launch plan

Week	Build
Week 1	Fill in the ideal new agent profile, your first-year offer and the one-page fee summary
Week 2	Publish or update your careers page, add the marketing an agent gets, and schedule the first four recruiting posts
Week 3	Build your outreach list from two sources, send the first contacts and set the follow-up dates
Week 4	Confirm a mentor, prepare the before-day-one checklist and set the date for your first career night

Compliance check for recruiting

Recruiting touches license law, tax rules and marketing rules. Review this list with your attorney and your state real estate commission guidance when you set up the system, and again each year.

Area	What to check
Independent contractor status	Under IRS rules, licensed real estate agents are treated as self-employed for federal tax purposes when substantially all pay is tied to sales or output rather than hours worked, and the work is done under a written contract stating they will not be treated as employees for federal tax purposes. State rules can add their own tests.
Recruiting advertising	Your state's advertising rules, including brokerage name and contact display, apply to recruiting ads, posts and your careers page. Avoid income promises and guarantees of leads.
Agent stories and photos	Get written permission before featuring an agent's name, photo, milestone or quote.
Email	Include your physical mailing address, a working unsubscribe and an honest subject line. Honor opt-outs promptly.
Calls and texts	Automated or platform-sent texts generally need prior consent under federal TCPA rules. Personal one-to-one outreach from the broker is the simplest starting point.
Recruiting bonuses and referral payments	Confirm with your state commission whether and how recruiting or referral bonuses can be paid, and to whom.
Agents joining from another firm	Do not request or use a prior firm's client lists or confidential information. Ask the agent to follow the terms of their existing agreement when they leave.
Interviews	Use the same core questions and scorecard for every candidate, and keep protected characteristics out of every conversation and decision.
Mentor arrangements	Put any mentor share of commission in writing, signed by the broker, the mentor and the new agent.

This playbook is general information for brokers and owners, not legal or tax advice. Rules vary by state and change over time. Confirm requirements with your state real estate commission, your MLS and a qualified attorney or tax professional.

Statistics: National Association of REALTORS®, 2026 Member Profile. Contractor rules: Internal Revenue Service, Statutory Nonemployees guidance.

Want a hand putting this to work?

Marketing and recruiting systems for brokerages, teams and agents.

Urban Marketing Edge builds and runs marketing for brokerages, teams and agents: recruiting content, agent onboarding kits, listing launch systems, email, websites and monthly training. If you want to talk through how this playbook would run inside your office, book a 30-minute strategy call.

Book a 30-minute strategy call	calendly.com/urbanmarketingedge-info/30min
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Casey McClintic teaches lunch and learn sessions in brokerage offices covering real estate advertising and fair housing.