

# PAAR

PEORIA AREA ASSOCIATION OF REALTORS®

## MEMBERSHIP CHANGE REQUEST

License must be processed through IDFPR's Online Services Portal prior to submitting this form to PAAR.

**ADD NEW AGENT**

**UPDATE PERSONAL INFO**

NAME

COMPANY

BRANCH

**REMOVE**

NAME

COMPANY

BRANCH

NAME

HOME ADDRESS

CITY, STATE, ZIP CODE

HOME PHONE

CELL PHONE

EMAIL ADDRESS

WEB PAGE

**TRANSFER (BETWEEN BRANCHES)**

FROM:

COMPANY NAME

ADDRESS

TO:

COMPANY NAME

ADDRESS

I CERTIFY THE LICENSING MAINTENANCE HAS BEEN PROCESSED THROUGH IDFPR'S ONLINE SERVICES PORTAL FOR THE ABOVE NAMED AGENT.

MANAGING BROKER SIGNATURE (REQUIRED FOR PROCESSING)

**REAL ESTATE PROFESSIONAL PLAZA OF CENTRAL ILLINOIS**

7307 N. Willowlake Court • Peoria, Illinois 61614-8227

Phone: 309.688.8591 • Fax: 309.688.3120



## **MANAGING BROKER'S AGENT TRANSFER / TERMINATION WORKSHEET**

Please complete the following worksheet when an agent leaves your company. Email all documents (*this worksheet, Membership Change Form, SentiLock Equipment Return Form (if applicable) and terminated license*) to [dhughes@paarealtors.com](mailto:dhughes@paarealtors.com).

### **Is the agent transferring to another company within PAAR?**

- Yes, Sentrilock equipment does not have to be returned to PAAR. – **Proceed to Step 2**
- No, agent is leaving the real estate business. – **Proceed to Step 1**

### **Step 1 Prior to signing off on the agent's license:**

- Require agent to provide the PAAR SentiLock Equipment Return receipt (which also includes account balance) as proof Sentrilock equipment has been returned and account is current.

**OR**

- Collect the following SentiLock equipment from the departing agent and return to PAAR office.
  - SentiLock Photo ID Card
  - Card Reader
  - All Lockboxes
- Verify with PAAR all outstanding balances with PAAR have been paid in full.

**Note: Quite often agents fail to return their equipment and it has been challenging for PAAR Staff to succeed in the recovery of this equipment. Failure to return SentiLock equipment increases costs to all members replacing inventory, and ultimately causing a fee increase.**

### **Step 2 - Terminate sponsorship of an agent:**

- Managing Broker logs in to IDFPF's online portal to terminate license.
- Complete Membership Change Request form.
- Send Membership Change Request form to PAAR. Agent access to the MLS & Sentrilock will terminate upon receipt.

### **Step 3 - Transaction Management\***

This form must be completed and signed by the Managing Broker before any files will be transferred for an agent.

\*If your company uses Transaction Management exclusively for document retention to (paperless transactions), be reminded this is the only documentation your company possesses regarding the transaction (i.e. signed property listing contracts, sales contracts, etc.).

Please allow for 2 to 3 business days for transactions (depending on # of files) to be transferred after all membership transfer documents have been completed by the PAAR Membership Department. PAAR staff strongly encourages a confidential meeting to review the proper procedures prior to transferring to avoid any interruption to your business.

**Step 3 - Transaction Management\* (cont'd)**

By default, all transferred agents will receive an email from TransactionDesk containing links to PDF archive versions of all their transaction files, and their original transactions are retained by the original company. The linked PDFs can then be downloaded from the email links and uploaded into new transactions at the agent's new company.

- Closed Transactions (*please select one*)
  - Default setting is adequate. Do not transfer or duplicate any of the agent's closed transactions in TransactionDesk.
  - Transfer all original sold transactions with the agent. Previous company does not need to retain any of these transactions.
  - Only duplicates of transactions for the following listings shall be transferred: \_\_\_\_\_  
\_\_\_\_\_
  
- Open Transactions (*please select one*)
  - Default setting is adequate. Do not transfer or duplicate any of the agent's open transactions in TransactionDesk.
  - Transfer all original open transactions with the agent. Previous company does not need to retain any of these transactions.
  - Only duplicates of transactions for the following listings shall be transferred: \_\_\_\_\_  
\_\_\_\_\_
  
- Contacts (*please select one*)
  - Transfer contacts to agent at new company.
  - Contacts remain with the company.

Special Instructions: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Transferring Agent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Managing Broker Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Company: \_\_\_\_\_

For PAAR Staff Use Only
Date Rec'd _____
Member. Dept. _____
MLS Dept. _____

# TransactionDesk

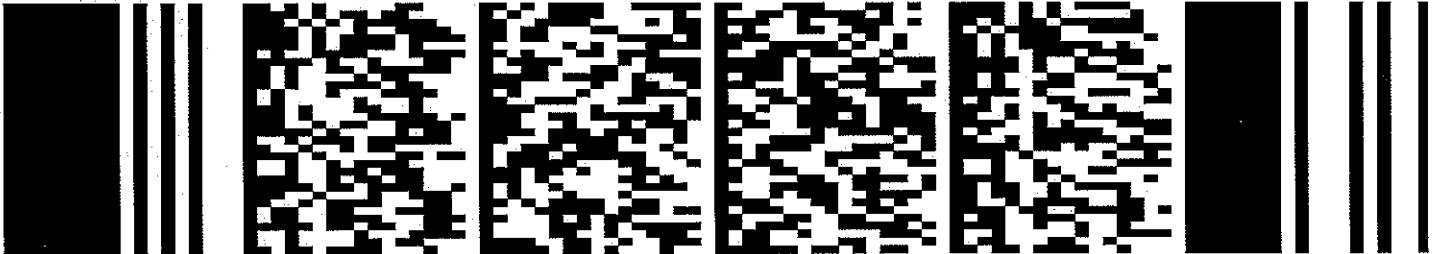
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## Fax-Back Cover Sheet

Attention Debbie Hughes

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***This fax must be sent to 1-888-895-6514 to be processed.***  
*If you are faxing from outside of the US, please use 1-720-836-6424.*



To verify Debra Hughes has received your fax please visit  
<https://www.transactiondesk.com/verify>

Enter the following barcode number: C0BDC447-6313-4043-9FA4-DA2B6EDB03F5

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### This TransactionDesk Cover Sheet was sent to you by:

Name : Debra Hughes  
Company : Peoria Area Assoc. of REALTORS  
Phone : 309-688-8591  
Fax :  
Email : dhughes@paarealtors.com

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### Instructions / Message:

Instructions:

1. Place this page as the first page of your fax message.
2. This Cover Sheet is used to return the document via fax to the person above.
3. Once the fax is received the person above will be alerted immediately that you have sent the fax.
4. A copy of the fax may also be emailed to the person above.
5. If your fax machine is not clean the Cover Sheet may not be read correctly and the returned fax may not be received.
6. The fax machine should not use photo mode when sending.

Per your request.

***This fax must be sent to 1-888-895-6514 to be processed.***

This cover sheet was generated by the TransactionDesk service - [www.transactiondesk.com](http://www.transactiondesk.com)