



**QUALIFYING REAL ESTATE COURSE APPROVAL FORM
 REAL ESTATE BROKERAGE (30 hour course)**

Provider Name _____

Title of Course _____

Name of Text or Workbook and Author _____

Length of Course
30 hours

Introduction

	Suggested Length of Unit(min.)	On Page #
Anatomy of Sales Agent/Broker Relationship	15	_____
Sales Agent/Broker Responsibilities	15	_____
SUBTOTAL	30	

Starting a Brokerage Business

Planning & organization; operational policies/procedures

Initial Planning	30	_____
Start Up or Purchase an Existing Brokerage	20	_____
Choosing a Business Structure - Franchise, Independent, LLC, etc.	20	_____
Naming the Brokerage	20	_____
Configuring the Brokerage	20	_____
SUBTOTAL	110	

Ethical & Legal Business Practices

Agency law; operational policies/procedures; planning & organization

Canons of Ethics	20	_____
Business Ethics	15	_____
Real Estate License Law	20	_____
Deceptive Trade Practices Act	20	_____
Real Estate Associations	10	_____
Responsibility of the Real Estate Brokerage	20	_____
Unfair Competition Laws	15	_____
Unfair Business Practices	15	_____
Americans with Disabilities Act	20	_____
Fair Housing	20	_____
Agency and Representation	30	_____

FOR TREC USE ONLY		
Included	Not Included	Comments
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

Real Estate Brokerage - Qualifying Real Estate Approval Form

Ethical & Legal Business Practices, cont'd

Agency law; operational policies/procedures; planning & organization

Prospecting Laws	20	_____
Contracts	15	_____
Disclosures	15	_____
Sherman Anti-Trust Act	15	_____
Do Not Call, Do Not Fax, & Anti-Spam Laws	10	_____
The Real Estate Settlement Procedures Act	20	_____
Protecting the Institution	10	_____

SUBTOTAL 310

Analyzing the Market & the Competition

Planning & organization; operational policies/procedures

What is the Real Estate Market?	15	_____
Analyzing the Market	15	_____
Analyzing the Competition	20	_____
Analyzing your Organization	30	_____
Developing & Implementing a Business Plan	30	_____

SUBTOTAL 110

Managing Risk

Planning & organization

General Operating Budget	20	_____
Financing Considerations	10	_____
Record Keeping	15	_____

SUBTOTAL 45

Marketing Best Practices

Planning & organization; records & controls; operational policies/procedures

TREC Advertising Rules	30	_____
Advertising Plan	30	_____
Policy/Procedures	30	_____
Social Media Marketing	30	_____
Broker Responsibility for Agent Advertising	30	_____

SUBTOTAL 150

Management Style & Structure

Operational policies/procedures

Leadership	25	_____
Managing People	25	_____
Management Styles	25	_____
Management Structure	25	_____

SUBTOTAL 100

FOR TREC USE ONLY			
	Included	Not Included	Comments
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____
	<input type="checkbox"/>	<input type="checkbox"/>	_____

Real Estate Brokerage - Qualifying Real Estate Approval Form

Recruiting & Hiring

Operational policies/procedures; records & controls; recruitment,selection & training of personnel

	Suggested Length of Unit(min.)	On Page #
Employment Relationships	15	_____
Federal/State Employment Guidelines	20	_____
Compensation Management	20	_____
Employment Process	15	_____
Selecting Sales Agents	15	_____
Selecting a Broker	15	_____
SUBTOTAL	100	

Professional Brokerage Competency & License Holder Productivity

Operational policies/procedures; planning & organization; recruitment, selection & training of personnel

Managing Employees and Independent Contractors	20	_____
Performance Management	10	_____
Orientation Programs	15	_____
Performance Appraisals	15	_____
Training Programs	15	_____
Business Meetings & Retreats	10	_____
Personal Interaction	10	_____
Retention	15	_____
Resignation and Termination	10	_____
Productivity Management	15	_____
Agent Business Plan	15	_____
Personal Marketing Plan	15	_____
Time Management Plan	15	_____
SUBTOTAL	180	

Practical Business Considerations

Real estate firm analysis

Financial Controls	10	_____
Monitoring the Business	10	_____
Management of Information	10	_____
Maximizing Income	10	_____
Minimizing Expenses	10	_____
SUBTOTAL	50	

Looking into the Future

Real estate firm analysis; expansion criteria

Long Term Planning	15	_____
SUBTOTAL	15	

FOR TREC USE ONLY		
Included	Not Included	Comments
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

Real Estate Brokerage - Qualifying Real Estate Approval Form

Broker/Sales Agent Roles & Responsibilities
Operational policies/procedures

Suggested Length of Unit(min.) On Page #

Sales Agent's Expectations of Broker	75	_____
Broker's Expectations of Sales Agent	75	_____
Geographic Competency	75	_____
Other Liability Issues	75	_____
SUBTOTAL	300	

TOTAL MINUTES 1500

FOR TREC USE ONLY		
Included	Not Included	Comments
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____