

Office Policy Manual Order Form

Frascona, Joiner, Goodman & Greenstein, P.C. ("FJGG")

4750 Table Mesa Drive Boulder, CO 80305 | Fax: 303-494-6309 | Phone: 303-539-9205

www.frascona.com Email: andrea@frascona.com

Please complete this form to order your Office Policy Manual. Email, fax, or mail it to us.

1. **Name Designation:** _____
(Name of Brokerage Firm EXACTLY as it Should Appear on Forms)

2. **Employing Broker:** _____
(Please Print Clearly)

3. **Primary Contact:** _____
(Name of individual completing the Order Form, if NOT Employing Broker)

4. **Address:** _____
_____, CO _____

5. **Phone:** _____ **Email:** _____

6. **Property Management & Other Activities When Brokers Receive Funds of Others:** [Pick one option.]

- A. We never manage property for clients. If one of our agents has a twenty percent (20%) or greater ownership in a property, then that agent may manage the property outside of the brokerage firm (consistent with Colorado Real Estate Commission Rules).
- B. We are primarily a property management company. We estimate that less than one (1%) of our gross revenue comes from buy/sell brokerage. [Pick only one of the following options]
1. When our agents have their own investment properties we require our agents to manage those properties inside of our brokerage firm.
2. If an agent has a twenty (20%) percent or greater ownership in a property, then the agent may manage the property outside of the brokerage firm (consistent with CREC Rules).
- C. We regularly engage in both buy/sell brokerage and property management. [Note: This option requires that the brokerage firm purchase **BOTH the Office Policy Manual and the Property Management Office Policy Manual for a total cost of \$600.**] [Pick only one of the following options]
1. When our agents have their own investment properties we require our agents to manage those properties inside of our brokerage firm.
2. If an agent has a twenty (20%) percent or greater ownership in a property, then the agent may manage the property outside of the brokerage firm (consistent with CREC Rules).
- D. Our Company does not exactly fit one of the above options. [When you select this option, we will arrange a phone appointment with one of our attorneys so that we can better understand your business model and determine the most efficient way to meet your needs.]

7. **My Brokerage Firm does not hold, and will never hold, money belonging to others.** For example, we do not currently hold any earnest money deposits, nor do we hold any security deposits, and we do not anticipate that this will ever change. TRUE FALSE

8. **Total Amount of Payment: [Check One.]**

\$350 Single Manual (Buy-Sell Brokerage **OR** Property Mgmt. & Leasing – 6A or 6B)

\$600 Dual Manuals (Buy-Sell Brokerage **AND** Property Mgmt. & Leasing – 6C)

9. **How did you hear about us?** _____

10. **Method of Payment:**

You will receive an email from our office with a link to provide payment via our online payment portal; or you can send us a check with your order form via regular mail.

I have enclosed my check made payable to FJGG.

IMPORTANT NOTES:

- This Office Policy Manual (OPM) is designed **for Brokerage Firms with Multiple Licensees** and designed to work **in conjunction with our Brokerage Relationship Policy**. If you are an individual broker, you may not need a general OPM; you may only need a Brokerage Relationship Policy and Data Protection Policy. Please call with questions prior to ordering, there is no charge to do so!
- The OPM requires your agents to comply with applicable public health orders. It does not have policies to fill in the gaps of the PHOs. The PHOs change frequently. Our OPM strives to avoid obsolescence. If you seek COVID-19 specific policies, call us. We'll explore ways that we can efficiently help you. That consultation is included in the price of your OPM.

If you wish to consult us about potential variations or additions, do not hesitate to call or schedule an appointment with an attorney. These consultations and subsequent drafting will be charged at the attorney's hourly rate.

REQUIRED AUTHORIZATION FROM EMPLOYING BROKER: I am the Employing Broker for my company and would like you to prepare these forms and send them to my firm. I understand that while my order creates an attorney-client relationship between FJGG and my brokerage firm, this is a limited services engagement such that taken by itself; my order of a Broker Product Form does not preclude FJGG from representing other clients who have interests adverse to mine.

Employing Broker Signature