



KELLY RIGHT
real estate®

v1| 2022

Onboarding Manual



The Right Way Home.

Welcome to Kelly Right!

We are an innovative, 100% commission, real estate brokerage that combines full support, cutting edge technology and outstanding marketing, while offering our agents the best commission structure in the industry.

We do this so our agents can offer their clients the best service possible!

Read through this Onboarding Manual to learn about Kelly Right and how to use our resources.

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NMLS# 1028232

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International, Inc.

ONBOARDING PROCEDURES

- ➡ Print this Onboarding Manual
- ➡ Print and work through the Checklist
- ➡ Take the Orientation Class
- ➡ Review the Agent Portal
- ➡ Print and Review the Brand Guide
- ➡ Attend Monthly Conference Calls
- ➡ Attend Weekly Trainings when able

Agent Website & Alias Email

➔ Your Agent Website

Fill out your agent profile website. Your profile appears on kellyright.com's "Agent Search". Add a profile picture, bio, business social media links (test them to be sure they work correctly), designations, etc. You must add your cities served. This is so we can find you when searching for an agent in your city for referrals. If your city is not available, contact us and we can add it to the dropdown menu.

The email and password to access your profile website is the same to log in to the Agent Portal. The agent roster search is located here: www.kellyright.com/agents

>>> Our advanced IDX websites are through kvCORE. You must contact us to be added to this program. Learn about kvCORE here: www.kellyright.com/agent-portal/kvcore

➔ Your Company Alias Email

There is no mailbox to sign in to, this is only a forwarding email address. This yourname@kellyright.com email address will automatically forward any emails it receives to your personal email address inbox. You then reply to those emails from your personal email program. You do not have to use your alias email in your marketing.



AGENT PORTAL

The Agent Portal is the home of critical company resources.

It is required you familiarize yourself with the Agent Portal and review it for answers to your questions, to access company forms, etc.

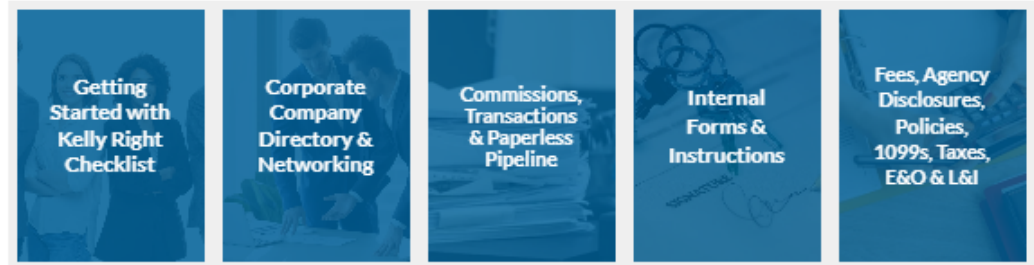
New and updated information is added to the modules frequently.

Log in to the Agent Portal with the same email address and password that was assigned to you for your Agent Website.



www.kellyright.com/agent-portal

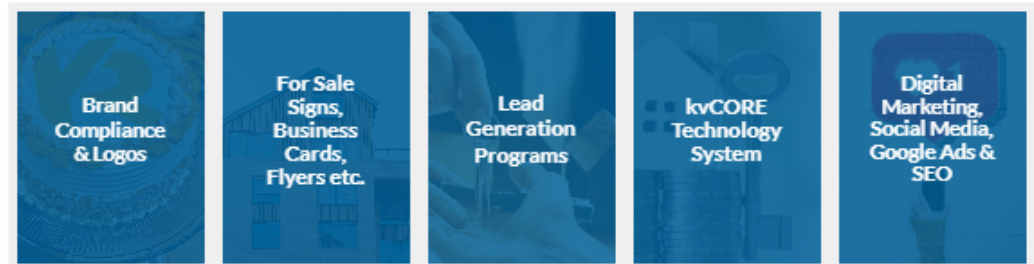
Company Information, Policies & Procedures



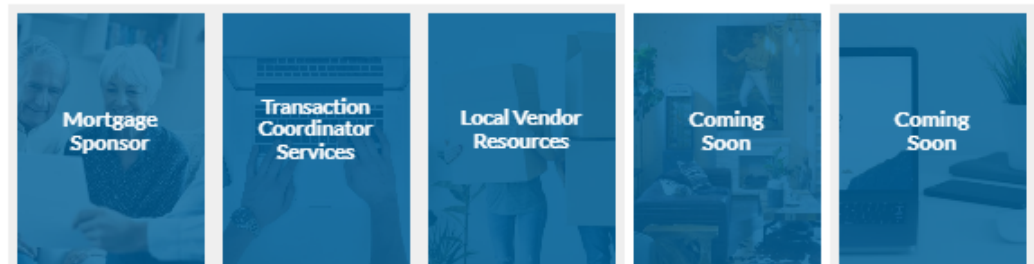
Training & Career Support



Marketing & Lead Generating Technology



Support Resources



AGENT PORTAL

...continued



www.kellyright.com/agent-portal

The Agent Portal is organized by 4 main topic headings, with multiple modules relevant to that topic under each main heading.

When you click into the module, you can click on section titles or scroll down the page to review all the sections.

Each section contains instructions, links, forms, and/or training relevant to that topic. Below are the topics covered in the Agent Portal.

1. Company Information

- Getting Started Checklist
- Corporate Directory
- Broker Contact Information
- Commissions & Transactions
- Internal Forms & Instructions
- Fees, Disclosures, Policies
- 1099's, Taxes, E&O

2. Training & Career Support

- Conference Calls
- Training Opportunities
- Scams & Career Safety
- CE Hours & Licensing
- Mentor Programs, Teams
- Networking Facebook Group
- Refer an Agent \$

3. Marketing & Lead Technology

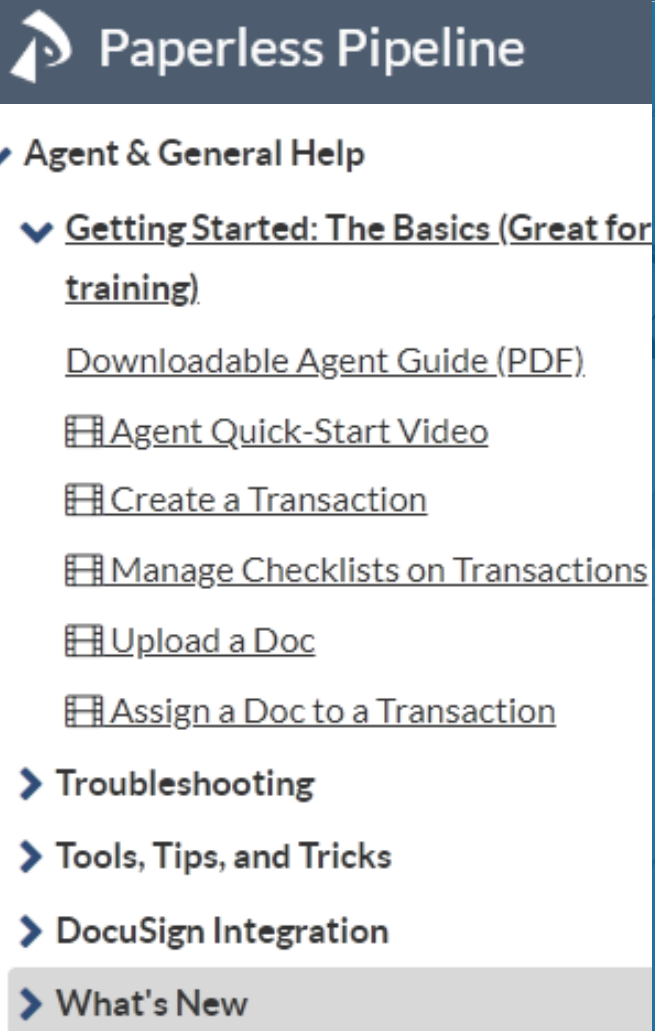
- Brand Compliance Policies
- Logo Files
- For Sale Signs, Business Cards
- Flyers & Marketing Templates
- kvCORE Technology System
- Lead Generation Programs
- Digital Marketing, Social Media
- SEO, Google Ads

4. Support Resources

- Mortgage Sponsor
- Transaction Coordinator
- Local Vendor Resources
- Office & Broker Information

Commissions & Transactions

Paperless Pipeline is the required program we provide for you to upload all of your real estate transaction documents to one virtual, secure location. You will receive an email from Paperless Pipeline with your account information. Please contact Stefanie at sfarrel@kellyright.com if you do not receive your account access email.



- ➔ Wire transfers are preferred. If a wire transfer cannot be sent, the check **MUST** be sent to Kelly Right's headquarters office address:
140 S. Arthur St #600, Spokane, WA, 99202
- ➔ Kelly Right's email address for commission and MLS forms:
admin@kellyright.com
- ➔ Standard wire transfer commissions usually take 1-3 business days. Checks usually take longer.
- ➔ You are required to upload all paperwork from the beginning of the transaction.
- ➔ Do not upload documents requesting Broker signatures, please email them directly to the Designated Broker, office staff, or to **admin@kellyright.com** first. Then you can upload them into Paperless Pipeline once they are returned to you signed.
- ➔ Review the Agent Portal for forms, Paperless Pipeline tutorials, and full commission and transaction instructions:
www.kellyright.com/agent-portal/paperless-pipeline

Conference Calls & Agent Training



Joe Kelly

**President, CEO &
Designated Broker**



Kendra Jenks

**Broker Liaison &
Real Estate Trainer**



Forrest Hayley

Real Estate Trainer

- ➔ Conference Calls are the 2nd Tuesday of every month via Zoom with Joe Kelly.
- ➔ Agent Training is every Tuesday via Zoom with Joe Kelly.
- ➔ Onboarding Orientation for agents joining Kelly Right is every Wednesday via Zoom with Kendra Jenks.
- ➔ Visit the Agent Portal for more weekly training classes with Kendra Jenks, Forrest Hayley's training videos and other learning opportunities.
- ➔ www.kellyright.com/agent-portal/training

Internal Company Forms

The Important Forms module on the Agent Portal is the place to find the policies and forms you'll need to conduct your business.

*Transaction forms are available through your MLS.

- Commission Disbursement
- Wiring Instructions
- HUD Homestore Information
- Transaction Coordinator Agreement
- Direct Deposit & Termination/Cancellation of Billing
- Credit/Debit Card & Bank Change Forms
- Policies & Career Guidelines
- Mortgage Lead Referral Fee Agreement
- Agent Referral Fee Form
- Address Labels, Logos & Letterhead
- W-9: for Tax Payer ID# & Certificate (Blank for Agent)
- W-9: for Tax Payer ID# & Certificate (Kelly Right's Info)
- Mentor Agreement Contract
- Refer an Agent to Kelly Right

Broker Commission Disbursement Form that is used for the real estate agent to receive their commission from title. Present this form to the title company and add to Paperless Pipeline. Personal transactions require a designated broker or office manager's (Stefanie or Angela's) signature. Wiring instructions and the office address for checks is on the form. We strongly encourage wire transfers. Commission Disbursement Form	HUD Homestore Bids Use this number when bidding for homes for your clients: NAID # SLNTR2664 / Florida NAID# KLYRG2666 If you are registered with Homestore, you will need to attach yourself to Kelly Right. If you are not registered, you will need to register and get set up. Don't wait until the last minute in case your client wants to make a bid. Contact HUD Homestore for questions at: 800-225-5342. Commission Disbursement Form	Transaction Coordinator Agreement In-house transaction coordinator that will help allow you to move onto new clients and get them under contract to increase your business. Pricing & FAQs visit the website , network and ask questions on the Facebook Group . Contact Angela: 844-535-5974 ext. 1001 / 1023! Transaction Coordinator Agreement \$500 Off Referral Reward Details
Bill Payment, Direct Deposit & Cancellation Plan Our direct billing allows agents to pay their monthly fee to Kelly Right with bankcard or automatic withdrawal. Please turn in a new form each time your credit / debit card information changes, or your bank account changes for commission direct deposits. To cancel billing, the form must be turned in by the 10th of the month to not be charged fees for that month. Credit / Debit Card Payment / Cancellation Authorization for Direct Deposit Commissions Bank Account Withdrawal Payment Plan	Wiring Instructions To send a wire transfer, you'll need the information in the form below. We strongly recommend wire transfers. If a wire transfer cannot be sent, then a paper check must be sent to the Corporate office in Spokane, Washington. If the check is sent to the wrong address, it will need to be canceled and then sent to the correct address or a wire transfer sent (preferred). If we have not received your check, please confirm it was sent to the correct address. This is the most common issue with late checks and why we do not recommend them. Wiring Instructions	Policies & Career Guidelines Every agent must check your state laws in regards to agency disclosures and other local required practices. The Laws and Policies pamphlets for your area may be found here for use in your transactions. These are required to complete your file for commission disbursement. <ul style="list-style-type: none">• Kelly Right Real Estate Policies & Procedures Manual• Alabama Buyer's Acknowledgement Statement• Law of Real Estate Agency: WA, ID, GA & OR• NAR Safety Webinars & Information• EGO Insurance Policies and Information Policies & Pamphlets
Mortgage Lead Referral Fee Agreement Modus Mortgage NMLS# 1028232 www.modusmortgage.com NMLS Consumer Access: www.btlrj/modusNMLS Licensed in: WA, ID, OR, MT, OK, AL & FL Lead Referral Fee Agreement Affiliated Business Disclosure with Modus	Referral Fee Form Form used when referring/receiving a referral to/from a different agent, regardless of state. Input the agent's name (not their broker's name) on the appropriate line. We strongly prefer wire transfers. Otherwise, a paper check to our Spokane office is required. Referral Fee Form Wiring Instructions	Kelly Right Marketing Resources Identity Brand Guide - Marketing Policies HQ Address Labels Logo Dropbox Files Marketing Canva Templates Kelly Right Letterhead More Marketing Resources
W-9 Form & E&O Insurance Policies E&O Insurance is included with your monthly fee. Please visit link below for E&O Policies and Information. W-9: Tax Payer ID# & Certificate (Kelly Right) W-9: Tax Payer ID# & Certificate (Blank for Agent) E&O Insurance Information	Mentor Agreement Contract Our mentor program is an excellent way to facilitate and encourage new agents (Mentees) to learn, grow, share and build their business while under the watchful eye of a more established and experienced real estate professional (Mentor). This program is designed to establish the relationship from the initial sign up period through the first 3 completed/closed transactions. Mentor Agreement Contract	Trainings with Kendra Broker Liaison, Kendra Jenks offers weekly Zoom trainings covering the following topics: New Agent Orientation- which is an excellent class for agents new to Kelly Right, Growing your Business with Social Media and iVCORE Trainings. You are welcome to take the classes as many times as you need! Visit the Training Schedule below for class times, and lots of great training links and information. Kendra's Training Schedule
Utah Earnest Money in Real Estate Trust Account Utah agents must use the standard companywide Wiring Instructions Form for commissions. DO NOT wire earnest money using our standard wiring instructions form. Utah is the ONLY STATE that can accept earnest money deposits in the Utah real estate trust account. These deposits are allowed only on a case by case basis. Contact Stefanie Farnel at stfarnel@kellyright.com for questions, the Utah Earnest Money Wiring Instructions Form and approval prior to using this method. Otherwise, please use our standard company wiring instructions below. Company Wiring Instructions	Independent Contractor Agreement To review Kelly Right Real Estate's Independent Contractor Agreement, please visit the link below. This form can also be sent to agents who you have referred to Kelly Right Real Estate who would like to join us. Agents can also fill out the form on our Careers page at www.kellyright.com/new-agent-paperwork Independent Contractor Agreement	Refer an Agent to Kelly Right Do you have an agent you would like to refer to Kelly Right? We offer \$200 for every agent referral who signs up and stays with Kelly Right for at least 90 days or more. (From now until Dec. 31, 2022 we are offering \$300) Standard \$200 Refer an Agent Form Limited Time Special \$300 Refer an Agent Form



www.kellyright.com/agent-portal/forms

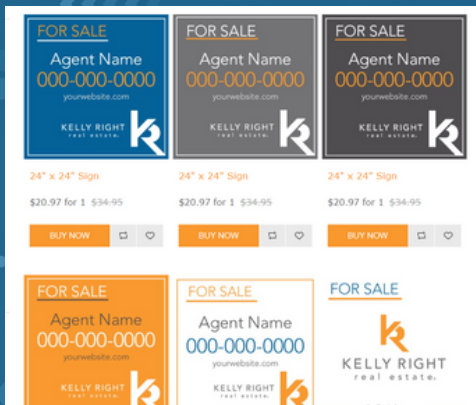
Branding Policies, Marketing & Lead Generation Resources

The Marketing section of the Agent Portal contains the Brand Guide, logos, signs, business cards, marketing resources, lead generation programs and digital marketing education.

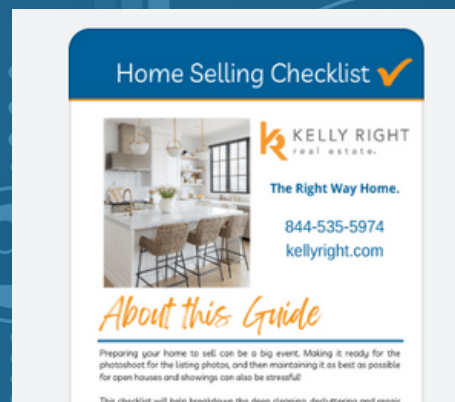
It is required that you review our Brand Guide to learn about our logos, colors, and marketing compliance policies.

Resource Examples:

- ➔ ZipYourFlyer offers a listing flyer email service to agents in your MLS.
- ➔ Listing Booster is a marketing program with text code rider signs.
- ➔ kvCORE is an advanced CRM and IDX feed website that can help generate leads.
- ➔ Opicity is a lead generating program through Realtor.com
- ➔ ListReports offers social media and other marketing options.
- ➔ Shop for signs, business cards and more in our online store – OR –
- ➔ Edit your own signs, business cards and flyers with our templates.



Signs & Business Cards



Marketing Materials



Listing Booster



kvCORE Technology

UPDATE YOUR INFORMATION:



Company Info

If you were previously with another brokerage, make sure to update your company name to Kelly Right Real Estate on all of your business related material. "Real Estate" must be spelled out, do not use "Realty".

The state can fine you for not having your correct office updated.

Branding compliance information and Kelly Right logos are provided in the Marketing module of the Agent Portal and in the Brand Guide.



Where to Update

Examples of places to update:

Your website(s), email signature, email address, Facebook business page, voicemail message, cover photos, logos, Realtor.com profile, Zillow profile, LinkedIn, Yelp profile, MLS signature, Google profile, blog, TourFactory, HomeSnap, YouTube channel, Instagram, Next Door, business cards, postcards, printed signs, domain name re-directions to updated websites, etc...



Phone Number

You must have your personal phone number in your MLS profile and on your listings and any other marketing services you use, such as TourFactory, ShowingTime etc.

It is required your contact information is in your marketing where you can be reached directly, especially over weekends, holidays and after hours when we are not in the office to redirect calls. You will miss out on leads if you do not have your contact information included on your listings and marketing.



Domain Names

Be sure to check any domain names you may have. Also, check your social media and links.

Some agents have confused page titles for the url, or @usernames and other issues such as spaces in typed urls thinking that is the working link.

Be sure to test that the links work whenever you post them.

Once you've saved the changes, click on the link to test it. Broken links is something we see happen regularly.

CORPORATE COMPANY DIRECTORY

Meet the corporate office staff at Kelly Right Real Estate.

Learn what each team member's role is, who your broker and broker liaison is, who the person is to contact for your specific questions, and how to contact them.

- ➡ www.facebook.com/groups/kellyrightagents
- ➡ www.kellyright.com/agent-portal/company-networking

FACEBOOK DISCUSSION GROUP

This is a private facebook group for current Kelly Right agents and employees. The purpose of this group is to learn, ask questions and network with each other.

Ask about referrals, hosting open houses, discuss marketing tactics and other real estate situations.

Please keep sharing listings and self promotion posts to a minimum so that we can maintain the learning focus of the group.

Company Communication

We send company emails approx 1-2 times a week and we send company texts even less. Please check your junk mail and mark our emails as safe.

Review the page on the Agent Portal on how to protect yourself from scams and how to know the difference between an email or text coming from the company and how to tell if it is a scam.



Company Emails/Texts

Be sure to read our emails and texts. Do not block us and do not unsubscribe.



How to Detect Scams

Do not reply to scams, do not forward them, do not click on links, do not give private info.



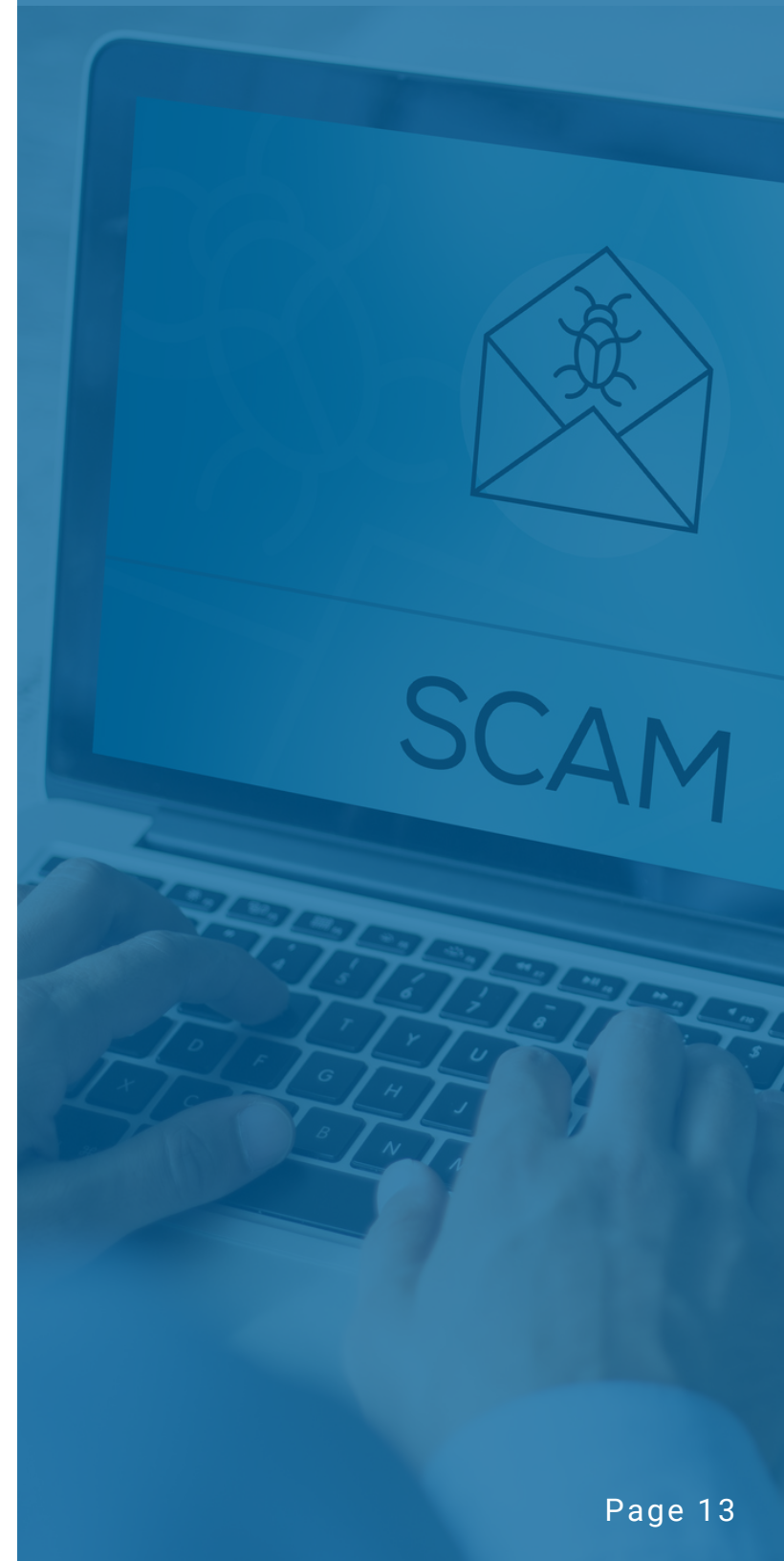
Career Safety Tips

NAR's resources on Mental Health, Identity Theft and Physical Safety.



How to Report Scams

How to protect yourself and how to report scams to the FTC and the FBI.





Helping YOU while you help others!

Kelly Right Agent Pricing:

\$150 per transaction

\$200 per transaction (Dual Side)



apeterson@kellyright.com *Preferred



509-489-7000 ext. 1001 or ext. 1023



www.transactioncoordinatorservice.com



www.facebook.com/KellyRightRealEstateTransactionCoordinator

- Review contracts and essential addenda for compliance.
- Open file with escrow and/or title company.
- Order title and survey.
- Deliver copies of contracts and addenda to cooperating agent.
- Preparation of disclosures, amendments, and addenda.
- Manage deadlines as needed throughout the transaction.
- Follow up with the escrow company and cooperating agent.
- Keep the agent informed of all communications.
- Send status e-mails and advise the agent of pending deadlines.
- Ensure all paperwork is provided to all parties.
- Coordinate closing time with all parties.
- Follow up with escrow and title company on the closing day.
- Upload all paperwork to Paperless Pipeline.



Joe Kelly, NMLS# 90325 & Louie Flores, NMLS# 1009422

Because Rates Matter

Modus Mortgage NMLS# 1028232, founded by Kelly Right President, Joe Kelly NMLS# 90325, is an award winning mortgage brokerage that is serious about interest rates. Why? A great interest rate may be the difference in getting an offer accepted in this competitive market. Be certain your clients maximize their purchase power so you can secure the transaction.

Modus sponsors marketing programs designed to help Kelly Right agents' businesses. It is not required your clients use Modus, but if they do, we know they will love the services Modus provides. Do your clients a favor and have them compare our rates and fees. Because rates matter. www.modusmortgage.com



Follow Modus
on Twitter for
rate updates!

Licensed In & Service Areas: Washington, Oregon, Idaho, Montana, Oklahoma, Alabama & Florida
Headquarters: 140 S Arthur St #600, Spokane, Washington, 99202 | Phone: 844-MODUS-11 / 844-663-8711
Company NMLS# 1028232: www.nmlsconsumeraccess.org/EntityDetails.aspx/COMPANY/1028232
Affiliated Business Disclosure: www.kellyright.com/affiliated-business-agreement-2 | Equal Housing Opportunity

About Joe Kelly

President, Founder & Designated Broker

“

Several decades ago, I saw too many agents who did not have the support and training they needed in order to fulfill their clients' goals. While at the same time, they were not getting paid what they were worth. I realized the need to create a more efficient real estate company; one that empowered real estate professionals to provide their clients exceptional service and earn a better commission.

As the industry evolved, I developed an improved way to practice real estate. Today, Kelly Right professionals are given the tools, training, technology and support to meet their client's needs. It is an exciting time in real estate, and Kelly Right has created more effective strategies to increase business and provide client satisfaction. - Joe Kelly

”



Joe has managed over 50,000 transactions. His unique and extensive background in financing and real estate provide the framework for a company designed to benefit its clients in a way no other full service real estate company ever has.

Joe hosts monthly Conference Calls and weekly trainings to pass on his knowledge to Kelly Right agents.

History of Kelly Right International, Inc.

Kelly Right Real Estate started from humble beginnings and continues to expand to meet agents' and clients' needs as the industry and technology evolves.

2005

Joe Kelly starts the company in Seattle, WA in 2005 and moves it to Spokane, WA in 2006. This move is to keep operating costs low so he could pass the savings on to clients.

2006

Agents are offered 100% commission with low fees. Joe names the company Soleil Real Estate and adds a home loan division in 2007.

2009

Joe remodels a small house for an office and grows to become the largest independent broker in Spokane. This is due to the support, training and commission structure, even in the midst of a housing market crash.

2012

The company expands and Joe opens a second location in Seattle. He hires a full-time loan operations manager, Louie Flores NMLS#1009422. Soleil expands to Coeur d'Alene, ID and Portland, OR in 2013.

2014

As the housing market begins to recover, expansion of the company was a natural progression. The corporate headquarters moves to its present location in Spokane, Washington with additional support staff.

2015

Joe renames "Soleil" to Kelly Right Real Estate. The mortgage division is renamed to "K Loans", NMLS# 1028232. Kelly Right International Inc. is formed.

**2016-
2019**

The company expands to more WA, ID and OR locations. Operations are opened in FL, AL, MT, GA and UT. Kelly Right is first named in the Real Trends Top 500 Brokerages in America, and #10 Independent Brokerages in Washington.

2021

Kelly Right rebrands its logo and marketing materials, rebuilds the website, adds more agent resources and begins expanding into new states. K Loans is rebranded to Modus Mortgage, NMLS # 1028232.

2022

Kelly Right expands to: OK, CO and NC, with more states scheduled to open by the end of the year and in 2023.



**We look forward to helping your business grow!
Most FAQ's can be answered in the Agent Portal.**

**The Onboarding Orientation class teaches you how
to use the Agent Portal.**

**All marketing resources and branding compliance
questions can be answered in the Brand Guide and
in the Marketing section of the Agent Portal.**

**Please contact us if you need assistance or have any
other questions.**

Thank you!