

SUN REALTY
3757 Tamiami Trail N.
Naples, FL 34103
239-649-1990
239-649-1980 Fax

Welcome to Sun Realty!

Please fill out the information below for our records.

Please Print

Name (as it appears on License) _____

Social Security Number _____

Address _____

City _____ State _____ Zip Code _____

Home Phone _____ Fax _____ Cell _____

Toll Free _____ Other _____

Email _____

Website Address _____

Office Use Only

Board _____ init _____

DBPR _____ init _____

Website _____ init _____

Invoiced _____ init _____

W-9 _____ init _____

Agent List _____ init _____

Mail Box _____ init _____

Login name _____

Password _____

Terminated _____

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	Check appropriate box for federal tax classification: <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <input type="checkbox"/> Other (see instructions) ▶ _____	Exemptions (see instructions): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	City, state, and ZIP code	
List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number									

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Employer identification number									

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below), and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here	Signature of U.S. person ▶	Date ▶
------------------	----------------------------	--------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. The IRS has created a page on IRS.gov for information about Form W-9, at www.irs.gov/w9. Information about any future developments affecting Form W-9 (such as legislation enacted after we release it) will be posted on that page.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, payments made to you in settlement of payment card and third party network transactions, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the

withholding tax on foreign partners' share of effectively connected income, and

4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct.

Note. If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.



Policy and Procedure Manual

Revised April 2006

Dear Agents,

We want to thank you for becoming part of our Sun Realty family. Sun Realty is a full service real estate company with a reputation for having the most educated and professional sales associates. Although our main office is located in the heart of Naples, we offer superior services to our clients in Naples, Marco Island, Bonita Springs, Estero, Ft. Myers, Punta Gorda, Port Charlotte, Tampa, as well as Miami/Dade and Broward Counties.

Our office staff is available to personally answer our phones seven (7) days a week. The hours of operation are Monday through Saturday 8:30 am– 5:00 pm and Sunday 12:00– 4:00 pm.

This manual is written for your benefit. As an Independent Contractor, you are required to do certain things that fall inside Real Estate Law, Ethics, or Contractual Agreements.

The Policies and Procedures Manual is not a contract. However it is a handbook designed to help you perform your functions more effectively in a group.

Independent Contractor

All associates at Sun Realty are Independent Contractors. Because of this agreement, Sun Realty does not withhold Federal, State, or Local taxes from the commission checks. All associates are responsible for paying their taxes on time or making suitable arrangements with the government.

Office Charges

As of January 1, 2006 if your check has not been received by the 15th of each month, there will be a \$10.00 per day fine added on to your monthly invoice. We will accept credit cards with an additional 10% added on to your account. If balance is not paid by the 30th of each month, your license must be removed from Sun Realty.

Office charges are as follows:

- \$100.00 Monthly Charges
 - \$ 17.50 NABOR MLS Fees/Monthly
 - \$ 23.50 Bonita MLS Fees/Monthly
 - \$ 35.00 Charlotte Area MLS Fees/Monthly
 - \$ 24.00 Fort Myers/Beach MLS Fees/Monthly paid by agent directly to board
 - \$ 30.00 Marco Island MLS Fees/Monthly
 - \$.05 Copies each
 - \$ 1.00 Laser Printing (Business Cards, Brochures etc.)
- Misc. Charges include Long Distance Phone/Fax.

In addition to these charges if you wish to have an office, the following are applicable:

- \$125.00 Desk Fees/Monthly
- \$500.00 Private Office/Monthly

Transaction Fees

- \$50.00 per side/per transaction

E & O Insurance

- \$25.00 per side/per transaction

Listing Agreements

The associate is responsible for preparing an accurate listing agreement. **DO NOT** put information on the listing agreement that you do not know as fact!! Do your homework. Remember, just because the MLS carries the statement that the information is subject to error and omissions and is not warranted, it does not mean that you won't be sued if a Buyer feels they have been subject of a fraud. Be factual, limit opinions. When the listing is signed by your clients, it must be signed by the broker, a copy of the contract must be given to the office, along with showing instructions and MLS input. Be sure to proof read the data input sheet carefully, no one but you will be held responsible if there are errors in the Multiple Listing Service. Signage may not be put up on the property until the office has a copy of the contract.

Record of Showings

The staff will have the record of showings at the front desk. It is your responsibility to see that your listing instructions are available to the staff as soon as possible. It is also very important that the correct showing instructions be on the showing sheet and are clear to the staff when appointments are scheduled, please make any changes in showing instructions as soon as it is available.

Our staff is instructed to get the full name of the agent, company, and phone number, time and date of showing.

Contracts

All contracts (offers, pending, pending with contingency etc.) must be present in the files. It is expected that all associates are capable of legible contracts, however, unique situations do occur, before creating a problem for yourself, your clients and the company, call either an attorney of your choice for guidance or speak to your broker about problems you are having with an unusual contract.

Remember, it is better to seek help in early stages rather than to wish you had later on.

Commissions

It is required by NAR Code of Ethics to explain to the seller the broker's policy regarding cooperation with and compensation to the other broker's.

It is the policy of Sun Realty to cooperate with and compensate, transaction brokers, single agents and no brokerage relationship.

Associates are **NEVER** permitted to pay another agent or a referral agent directly, any deviation from this procedure is a violation of Florida Real Estate Licensing Law.

Referral

When you establish a referral, either outgoing or incoming, be sure to clarify the referral commission in writing. Also follow up with the sources of the referral. All referral checks must be issued by the company to the company of the source, for example Sun Realty to ABC Realty you should always make a note on the closing statement and on the "In-House" Commission Disbursement request.

In-House Forms

We have provided "In-House" forms for your use, we encourage you to follow these forms for prompt and accurate payment.

The first is the Transaction Information Sheet. This provides information regarding Seller, Buyer, Property Address, Price, Listing Agent and Buyers Agent, this form must be filled out and sent in with your offer or pending sale.

The second form is the Commission Disbursement Form, this provides information regarding commission due agent, processing fee due Sun Realty, and/or a possible referral fee due to another broker.

The third is the listing and sales checklist, this provides information regarding the exact paperwork needed in the office and at what time.

But remember any and all paperwork pertaining to a listing or sale should always be in the file.

These forms must be filled out properly and all paperwork turned in before payment will be made.

Office Bill

Office bills are sent out before the first of each month. They are due by the 15th of each month, if they are received after the due date, they are considered delinquent.

The late penalty is assessed at \$10.00 per day. If the balance is not paid by the 30th of each month, your license must be removed from Sun Realty.

Security Deposit

Upon joining Sun Realty you are invoiced for first month/ last month and MLS fees. The last month fee is considered your security deposit. This deposit is refundable within sixty (60) days after the agent leaves the company, providing there are no outstanding office bills. If an agent terminates and has delinquent office bills, the deposit balance will be used to offset the delinquencies.

Legal Fees

Should legal fees be incurred by Sun Realty on behalf of an agent, the agent will be responsible for reimbursing Sun Realty for all expenses incurred.

License Renewal

Each year when it is time to renew sales licenses, each associate is responsible for seeing that the license renewal fee is paid on time and that you have completed the education requirements. The office must always have a current copy of your Real Estate License and Continuing Education Certifications.

Office Keys

Keys to the Naples Office and the Bonita Office are entrusted to you. You have the obligation to be careful in using them. At NO time should you loan your keys to anyone, including other associates. When leaving the office during Non-Business hours please make sure that the doors are locked.

Conference Room

You may reserve the conference room by calling the office. Please leave the conference room the way you found it. If you have food or beverages, please be sure to remove all trash after you leave.

Copy Machine

All associates are assigned a four digit copy code. Keep it confidential, if you don't someone else will be able to make copies using your number. You will be responsible for those copy charges on your monthly bill.

One of the most difficult administrative details of a copier is keeping it running properly. If you experience difficulty, please make the staff aware of the problem. The copier does have instructions as to troubleshoot problems, it displays the area(s) involved, always read these instructions first before asking the staff to assist you. Do not force the machine to do something when it is jammed. Also if the machine jams after hours, please leave an "Out of Order" sign on it, and leave a note for the staff.

Vacations

Your vacation time is your business. However we do require that we know when you are on vacation and who is handling your business in your absence. If you have made special commission arrangements with your "substitute", please be sure a written memo on that arrangement signed by both of you exists and is on file with our office manager.

It is always a good idea to tell your customers that you are going on vacation and introduce them to your substitute.

Board Fees and Phone Numbers

All agents receive a bill from the Board of Realtors for Annual Dues. Board fees are a personal expense. It is the agents responsibility to pay this bill on time. When an agent is in arrears, the Broker of record will be notified by the Board. If the associate does not bring the account current by the Board's deadline, the Broker will be forced to return the agent's license to the Florida Real Estate Commission. You can not have a sales license active in a Broker's office if the Broker is a Board member and you are not! You also can not belong to Sun Realty if you are not a Board member. It is also the responsibility of the agent to have their own Supra Keys and Keyboxes, these can be obtained at your Board of Realtors.

Naples Area Board of Realtors
239-597-1666

Bonita Springs/Estero Association of Realtors
239-992-6771

Ft. Myers/Ft. Myers Beach Board of Realtors
239-936-3537

Punta Gorda/Port Charlotte/North Port Association of Realtors
941-629-8261

Marco Island Board of Realtors
239-394-5616

South Broward/ Miami-Dade
954-431-5300

Mid-Florida Regional
813-879-7010

Advertising

Advertising is the responsibility and personal expense of the individual agent. As an agent you will have a great deal of flexibility on ad content and media selection. Under contract to Sun Realty you can not obligate the billing in the name of the company without the Broker's permission. Sun Realty normally gets contract rates from local papers, but as an agent, the media might not extend the same privilege.

Signs

It is your responsibility to see that signs are placed properly on the property and are not in violation of any city/county ordinances. In some of the suburban areas, the police will pick up the signs and you will have to pay a fine to retrieve the sign. If you are fined it is your responsibility to pay any and all fines incurred.

Vendor Information

The following are vendors that some of the agents are currently using:

Business Cards

Print Shop
239-775-3553 Phone

Signs

Sign of the Times
239-352-5450 Phone
239-825-9674 Cellular

Installation of Signs

Sign-up
239-304-0025 Phone
239-353-3877 Fax

Advertising

Naples Daily News
239-263-4713 (ask for Carol)

The Ft. Myers News Press
239-335-0200 Main
239-335-0335 Classified

Homes and Land Magazine
239-949-2311

Attorneys

Craig D. Blume
239-417-4848 Phone
239-417-4840 Fax

Don Ross
239-434-7700 Phone
239-434-0339 Fax



3757 Tamiami Trail North
Naples, Florida 34103

239-649-1990 Phone
239-649-1980 Fax

Toll Free 1-877-649-1990 Phone
Toll Free 1-866-649-1980 Fax

www.naplessunrealty.com