

## YOUR 30-DAY CHECKLIST.

*A Smooth Brokerage Transition Starts with a Plan.*

You are not starting over.

You are changing back offices, systems, and signage.

Your clients still hired YOU.

Here's the checklist I'd want every agent to have during a brokerage transition.



### FIRST 72 HOURS: HANDLE THE PAPERWORK

- Transfer your license at the state level immediately
- Update your MLS affiliation and active listings
- Clarify pending transactions in writing
- Confirm escrow, commissions, signatures, and timelines
- Update your email signature, voicemail, and business info
- Notify your preferred lender, attorney, inspector, and title partners
- Double-check compliance requirements with your new firm

#### *Reminder:*

This is a **paperwork window**,  
not a **publicity window**.



### CLIENT COMMUNICATION

#### Active Clients:

- CALL them directly
- Keep the message short and calm
- Reassure them their transaction is still on track

#### *Suggested language:*

"I wanted you to hear this directly from me.  
I've moved my license to a new brokerage.  
Nothing changes for you. I'm still your REALTOR®,  
and your transaction remains on track."

#### Past Clients & Sphere:

- Send a short email or handwritten note
- Stay professional
- Avoid oversharing or criticizing your former brokerage

*Rule:* Never burn the boat you just got off of.



### SOCIAL MEDIA

Wait until paperwork is complete

- Make sure active clients hear from you first
- Keep your announcement simple and professional
- Use ONE clean post and move on

#### *Avoid:*

- Breakup-letter captions
- "New chapter, new energy" graphics
- Emotional oversharing
- Public conflict

*Your clients do not need a story.  
They need confidence.*



### USE THE TRANSITION TO UPGRADE

- Clean up your CRM
- Audit your database
- Learn your new tools quickly
- Rewrite your listing presentation
- Review where your business actually comes from
- Plug into coaching, training, and relationships immediately



The agents who grow the fastest  
use transitions to sharpen their business.



### THE 30-DAY MINDSET

For the first month, everything will feel unfamiliar.  
Different systems. Different routines. Different people.

*That feeling is normal.*

You are not relearning real estate.  
You are relearning an environment.

**Big difference.**



### WANT MORE REAL-WORLD ANSWERS?

Leigh answers the questions agents are actually asking right now about business, leadership, mindset, marketing, and navigating change in this market.

Visit:  
[LeighBrown.com/answers](https://LeighBrown.com/answers)