

Keller Williams Realty International

Entering Associates

Susan Cook

Stacia Thompson



Acknowledgments

The author(s) gratefully acknowledge the assistance of the following individuals in the creation of this course:

Norma Vranken
Antoinette Perez
Rose Jamison
Mary Cook
Cheryl Studer
Paula Hoefl
Mimi Hagan
Rita Landry
Michelle Heidt
Jo Lynn Bozer

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Overview

associates and Market Center Staff members are entered into the WinMORE System at the time their licenses become active with KELLER WILLIAMS.

You must have their Direct Deposit Bank Information before you can save an Associate record! Market Centers are responsible for sending an IRS Form 1099 to each associate on commissions paid during the year. Remember, with WinMORE you must **THINK 1099!** All associates who receive commission income in your market center must have the appropriate DAs posted to their Associate record. WinMORE produces the associate's 1099 at year end and all IRS 1099 requirements must be followed.

Married Couples or Teams

If several of your associates are incorporated together, EACH associate (including married couples) is entered here separately. Franchise Royalty is assessed for EACH associate in the KW System. Married couples are the only exception to this rule.

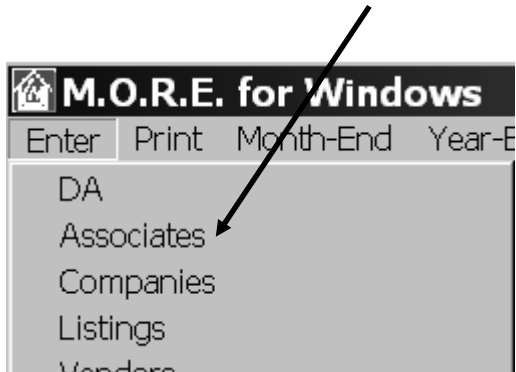
Administrative Staff

Enter the Market Center administrative staff into the Associate records also. Please review the KW Policies & Guidelines Manual for a list of who can be entered into WinMORE and participate in the KW Profit Share program and who can not!

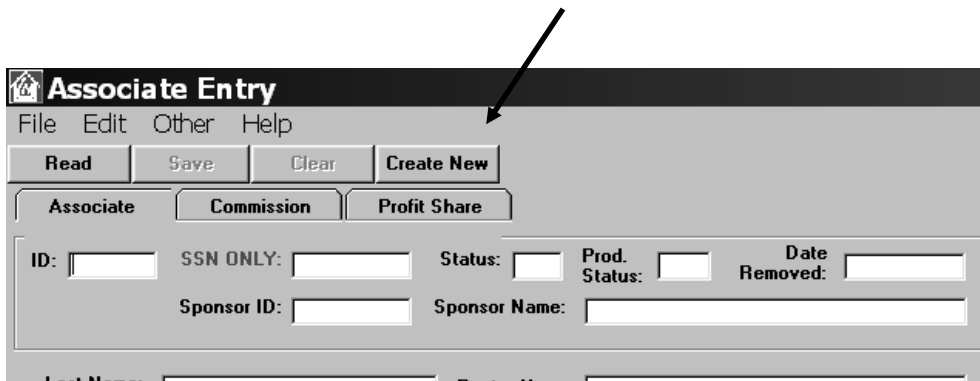
Associate Information

Entering Associates

To enter an associate, in WinMORE, click Enter and select Associates.



To create a new Associate, click "Create New."

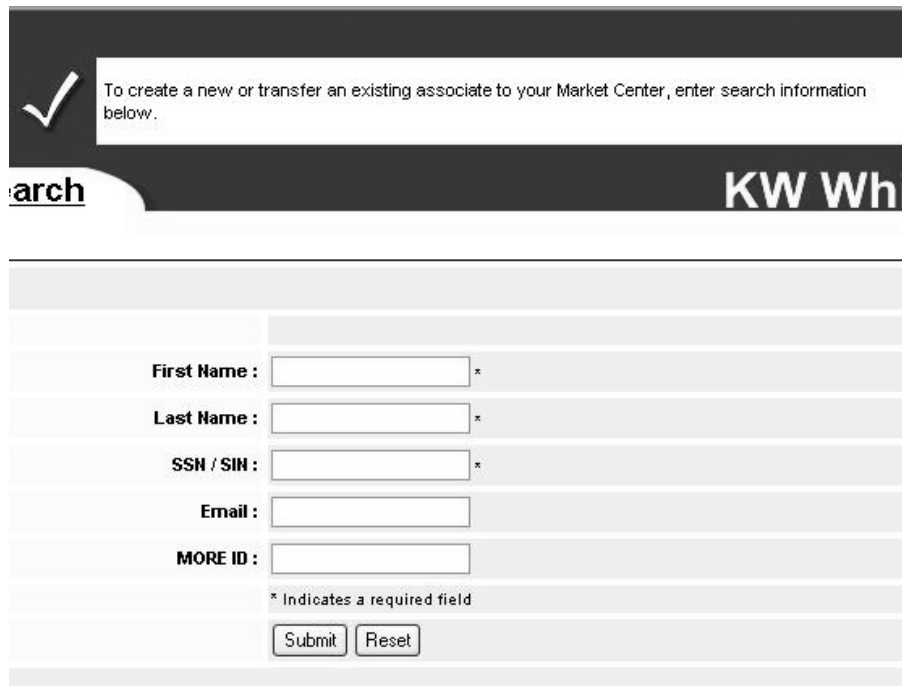


When you click "Create New" you will be sent to an Intranet screen.

Associate Information

Searching for an Existing Associate

The next step is to confirm the associate has not already been entered in another Market Center.



✓ To create a new or transfer an existing associate to your Market Center, enter search information below.

arch KW Whi

First Name : *

Last Name : *

SSN / SIN : *

Email :

MORE ID :

* Indicates a required field

Enter the associate's name, Social Security Number and click Submit. Note: When entering the associate's name, enter it exactly as it appears on the Social Security Card.

Associate Information

Search Results

If there are any matches to your search criteria, you will receive a list of existing associate records.

The following associates appear to match the information you entered. If the associate you are adding or transferring appears below please click the associate's name. This will allow you to transfer or add the associate to your Market Center.

Associate Search Results

KW White Pages

Showing Associates 1 - 2 out of 2

Name	MORE ID	Birth Date	E-mail	Phone	Roles
Robert Freeman	0662			512-507-3608	Agent at Arlington Business Center (72) Agent at Bonita Springs (536)
Robert Freeman, Jr.	3911	April 11	robertf@kw.com	512-306-7128	Support at Keller Williams Realty International (0) Administrative Staff at Keller Williams Realty International (0) Executive at Keller Williams Realty International (0) Kwu Administrator at Keller Williams Realty International (0) Legal at Keller Williams Realty International (0)

Is the associate not in the above search results? [Click here to create new associate.](#)

[Click here to search again.](#)

If you find the associate already entered in the WinMORE system through another Market Center, click on their name.

If you do not find the associate, click “Click here to create new associate.” See Creating a New Associate below for instructions.

Associate Information

Adding or Transferring an Existing Associate

If there are any matches to your search criteria, you will receive a list of existing associate records.

If the agent is already associated with another Market Center, you can add them to your Market Center or transfer the associate. Note: If an associate is transferring to your Market Center, you still must complete the transfer process.

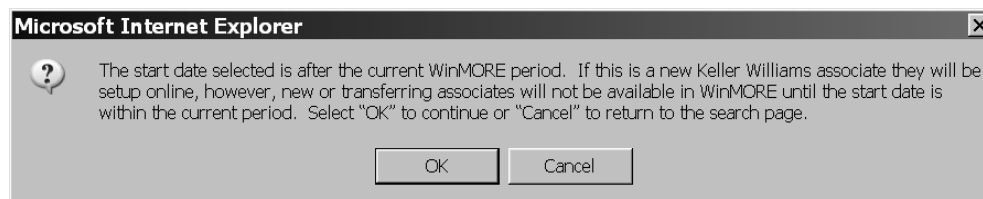
Select the role this associate will have in your Market Center.

Select “other” for OP, TL or MCA. Ask your Regional Director, Regional Operations Manager or Regional MCA to email roster@kw.com with the request that one of these roles be assigned to the associate.

Enter the associate’s start date in your Market Center.

If the start date is not in the current WinMORE month, the associate will be listed as pending. After transmittal, you will be able to download their information into WinMORE and complete the associate record.

When entering an associate start date after transmittal, you will receive the following message:



Associate Information

Creating a New Associate

If the search results do not match the associate you are trying to enter, click “click here to create new associate.”

Is the associate not in the above search results? [Click here to create new associate.](#)

[Click here to search again.](#)

Complete the fields on the Create Associate screen. Be sure the e-mail address is an existing address. The system will send the associate’s intranet username and password to this email address. Verify that the associate’s name is entered exactly as it appears on the Social Security Card.

Once all of the fields are complete, click Submit.

Create Associate

KW White Pages

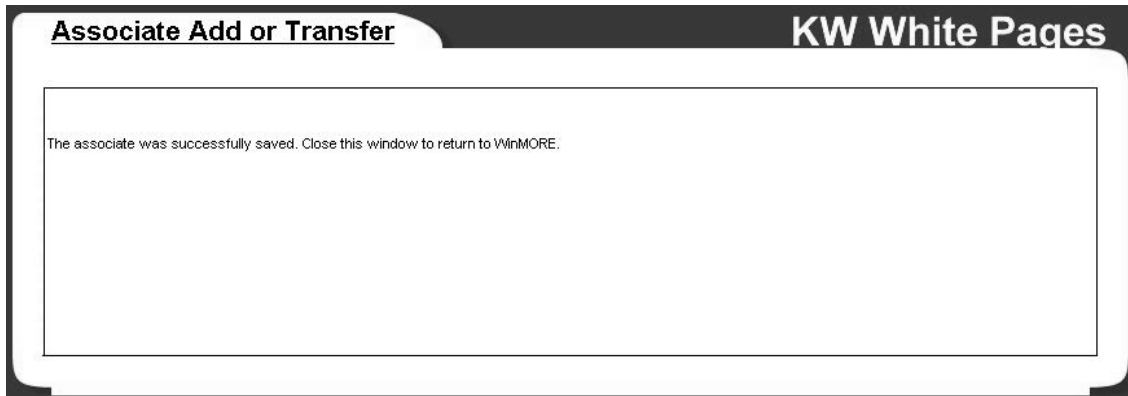
First Name :	<input type="text" value="Robert"/>	*
Last Name :	<input type="text" value="Freeman"/>	*
DBA Name :	<input type="text"/>	
SSN / SIN :	<input type="text" value="111223333"/>	*
What role do you wish to grant this associate in your Market Center (select "Other" for roles that will be assigned later):	<input type="text" value="[Select]"/>	*
Business Phone :	<input type="text"/> - <input type="text"/> - <input type="text"/> Ext. <input type="text"/>	
Home Phone :	<input type="text"/> - <input type="text"/> - <input type="text"/> Ext. <input type="text"/>	
Mobile Phone :	<input type="text"/> - <input type="text"/> - <input type="text"/> Ext. <input type="text"/>	
At least one of the three phone numbers is required. *		
E-mail :	<input type="text"/>	*
The e-mail address must already exist. This does NOT create a new e-mail address.		
* Indicates a required field		
<input type="button" value="Submit"/>		

Select “other” for OP, TL or MCA. Ask your Regional Director, Regional Operations Manager or Regional MCA to email roster@kw.com with the request that one of these roles be assigned to the associate.

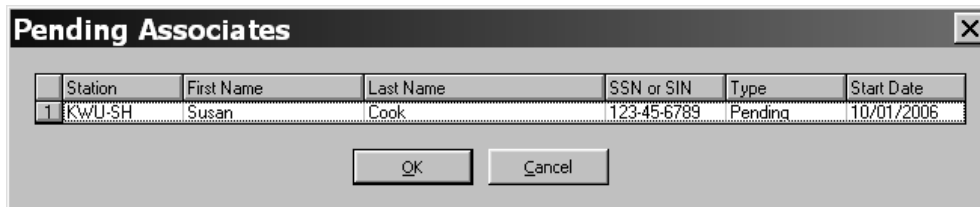
Associate Information

Saving an Associate

Once you have submitted the information (when adding an existing, transferring or creating a new associate), you will receive a confirmation that the associate information has been saved.



When you return to WinMORE, any pending associates that need to be completed in WinMORE will appear when you select Enter/Associate.



Double click on the associate to complete their WinMORE entry. You will complete the WinMORE fields like normal.

****Note**—this screen will not appear immediately in WinMORE. You must go to Enter and select Associates for this screen to appear.

If you're entering an associate with a start date in the current period, when you return to WinMORE, the Associate Entry screen will be ready for you to complete.

Associate Information

Completing the Associate Tab

Step 1

The associate's ID and SSN fields should be complete from the Intranet entry.

Step 2

Enter the status of the associate. (Press *TAB* to accept the default of *A* for new associates.)

Associate	Commission	Profit Share	* Intranet Update Field	
ID: <input type="text"/>	* SSN ONLY: <input type="text"/>	Status: <input type="text"/>	Prod. Status: <input type="text"/>	Date Removed: <input type="text"/>
Sponsor ID: <input type="text"/>		Sponsor Name: <input type="text"/>		

Valid Choices

- A** **Active** real estate license. This includes all employees, agents, and agent assistants who have a real estate license. Team Leaders and other staff members that have a real estate license are always Status = A(ctive).
- R** **Removed**- If the associate leaving is not vested, change the associate's status to R in the month that the associate departed. Once the removed associate is transmitted, any associates enrolled by the departing associate are rolled up the enrollment tree, right beneath the departing associate's Sponsor (enroller). It will also ensure that the departing associate does not receive a profit share check AFTER the current month.
- PO** **Personnel/Print Only**. Used for unlicensed market center staff members or unlicensed associate assistants.
- VR** **Vested and Retired**. Change a vested associate's status to V/R in the month he/she leaves. Any associate who stays with Keller Williams for three years is vested.*

* If a vested/retired agent returns to your market center, change the Status back to A.

*Associate Information***Step 2 (continued)**

Special Note: IF THE ASSOCIATE IS TRANSFERRING TO ANOTHER KW MARKET CENTER, DO NOT CHANGE A TRANSFERRED ASSOCIATE'S STATUS TO R before his/her downline has been transferred to the new Market Center by KWRI. Make sure an Associate Transfer Form is printed (see Print/ Associate Transfer) by the originating Market Center and the new Market Center has added the transferred associate to its WinMORE System. For more information, see the instructions printed on the bottom of the Associate Transfer Form.

Note: Never remove associates who have a downline and have been with Keller Williams for three or more years. They are vested in the profit share system and should be given the status of VR if they leave and do not associate with another Keller Williams Market Center.

*Associate Information***Step 3**

Enter the production status of the associate. (Press *TAB* to accept the default of *A* for new associates.)

Associate	Commission	Profit Share	* Intranet Update Field	
ID: <input type="text"/>	* SSN ONLY: <input type="text"/>	* Status: <input type="text"/>	Prod. Status: <input type="text"/>	Date removed: <input type="text"/>
Sponsor ID: <input type="text"/>		Sponsor Name: <input type="text"/>		

Use the quick reference guide to determine the correct production status.

ASSOCIATE STATUS COMBINATIONS QUICK REFERENCE GUIDE

Status	Production Status	License	Active in KW	Books Production	Cap Structure	On a Team or Group	Contributing Agent	eAgentC Fee
A	A	●	●	Self	Individual*		●	●
A	TA	●	●	Self	Individual*	●	●	●
A	TA	●	●	Lead Agent	Flexible**	●	●	●
A	TM	●	●	Lead Agent	Fixed***	●		●
A	TS	●	●	Does Not Book		●		
A	O	●	●	Does Not Book				

Under Cap Structure, Individual means each associate is assigned a cap and will have DAs processed under their name. Flexible means the DAs are processed under the Lead Associate, however the Lead Associate has a flexible team cap. This means the company dollar cap for this lead agent is increased every time they add a producing member to the team. Fixed represents the lead agents that have all transactions processed under just their name and they do not increase the company dollar cap as they add new members to the team.

*Associate Information***Step 4**

When a **non-vested associate** leaves Keller Williams, and you change their status to R, enter in the date that the associate license was actually removed from your Market Center. This date does *not* have to be in the current period.

Associate	Commission	Profit Share	* Intranet Update Field	
ID: <input type="text"/>	* SSN ONLY: <input type="text"/>	* Status: <input type="text"/>	Prod. Status: <input type="text"/>	Date Removed: <input type="text"/>
Sponsor ID: <input type="text"/>		Sponsor Name: <input type="text"/>		

Note: You will still be able to process pending DAs after removing an associate.

Step 5

Enter the ID number of the new associate's sponsor noted on the associate Application form and make sure the associate chooses their own sponsor and the sponsor's name is in their handwriting.

Associate	Commission	Profit Share	* Intranet Update Field	
ID: <input type="text"/>	* SSN ONLY: <input type="text"/>	* Status: <input type="text"/>	Prod. Status: <input type="text"/>	Date Removed: <input type="text"/>
Sponsor ID: <input type="text"/>		Sponsor Name: <input type="text"/>		

Enter the Sponsor's ID # if you know it, or press *ALT-DOWN* to display the following message to search for the Sponsor in *Your market center* file (your Market Center only) or the *All market centers* file (all KW Associates).

Associate Search ✕

Where do you wish to search for the Associate?

NOTE: If you are entering an associate whose Sponsor is not with Keller Williams yet but will join KW within the next 3 months, you may use the Team Leader as the Sponsor. If the Sponsor does not join a KW MC within a 3 month period, the agent has the opportunity to choose a new Sponsor. **The sponsor selected is the agent's choice.**

*Associate Information***Step 5, cont**

When selecting a sponsor that is located in more than one market center, you can now select the associate record that contains the profit share information.

When searching for the sponsor and you find the sponsor has a record in two Market Centers, select the record that contains a number in the field “1st line.”

All Associates								OK
ID	Sts	Name v	Market Center Name	Sponsor	Sponsor Name	1st Line		Cancel
1		Smith				0		Search...
2		JE E. SMITH				8		
3		Smith				0		
4		Smith				0		
5		Smith				1		

Step 6

Enter the Associate Information.

Last Name:	<input type="text" value="Thompson"/>	Roster Name:	<input type="text"/>								
First Name:	<input type="text" value="Stacia"/>	DBA Name:	<input type="text"/>								
Address:	<input type="text"/>										
City:	<input type="text"/>										
State:	<input type="text"/>	Zip:	<input type="text"/>								
Country:	<input type="text"/>										
E-Mail:	<input type="text" value="stacia.thompson@kw.com"/>										
Gender:		<input type="radio"/> Male <input type="radio"/> Female									
Real Estate License Date:		<input type="text"/>									
Real Estate License Number:		<input type="text"/>									
<table border="1"> <thead> <tr> <th></th> <th>Phone Number</th> <th>Code</th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>123-456-7890</td> <td>Office</td> <td></td> </tr> </tbody> </table>					Phone Number	Code		1	123-456-7890	Office	
	Phone Number	Code									
1	123-456-7890	Office									
The E-Mail address must already exist. This does NOT create a new e-mail address. Box: <input type="text"/>											

- **Roster Name** – Enter the associate’s nickname in the Roster Name Field.
- **DBA Name** – If the associate has a DBA, but does not have a separate business license/EIN #, enter that DBA name in the DBA Name field.
- **Real Estate License Date** – Enter the expiration date or the renewal date for the associate’s real estate license.
- **Real Estate License Number** – The associate’s Real Estate License Number is required for all Status A associates.
- **Telephone Numbers** – Enter the associate’s Phone Numbers. Use the box number for an office extension or mailbox number.

*Associate Information***Step 7**

Complete the Date fields for the associate.

Dates			
Enroll Date:	<input type="text"/>	* MC Co\$ Anniv. Date:	<input type="text"/>
		* Birthday:	<input type="text"/>
Start Month:	<input type="text"/>	Year:	<input type="text"/>
		Royalty Anniv. Date:	<input type="text"/>
		* Real Estate Date:	<input type="text"/>

- **Enroll Date** – The date the new associate's license transfer was signed and accepted by *your* Market Center Broker. For office staff, enter the day the employee (staff member) was hired.
- **Start Month** – This is the starting month from which to count the three years until the associate is vested. Enter the month the associate **first** became a Keller Williams associate. Press *TAB* to accept the default based on the Enroll Date above for **new** Keller Williams associates.
- **Start Year** – Enter the year the associate **first** became a Keller Williams associate. Press *TAB* to accept the default based on the Enroll Date above for first-time Keller Williams associates.

Important Note:

If this associate is transferring from another Market Center, WinMORE automatically inserts the correct Start Month and Year. The Enroll Date will be updated with the current date.

- **market center Co\$ Anniv. Date** – Enter the starting date from which the associate's Co \$ Cap is tracked which is usually the first day of the month **AFTER** the *Enroll Date* field above. This is the start of the associate's Anniversary (fiscal) Year with your Market Center.

Note: If the associate has a closing within the month their license was transferred to your Market Center (see Enroll Date above), consult with your Team Leader and the associate to determine if the Anniversary Date should be entered as the same date as the Enroll Date field above.

Agent Transfers - If an agent transfers to your market center from another market center and your market center OP agrees to accept Co \$ paid to the previous market center towards your market center Co \$ cap, you may enter the same Anniversary Date the agent had in the previous market center.

Married Couple Teams – If a married couple shares a cap, they must share an anniversary date.

*Associate Information***Step 7, cont.**

- **Royalty Anniv. Date** – Enter the starting date from which the associate's Royalty Cap is tracked, which is usually the first day of the month **AFTER** the agent first joined KW. This is the start of the associate's Royalty Anniversary (fiscal) Year.

Agent Transfers – If an agent transfers to your market center from a market center in your region, you may enter the same Anniversary Date the agent had in the previous market center. If an agent transfers to your market center from a market center outside of your region, check with your Region to determine whether or not your Region will give the associate credit for royalty already paid.

Married Couple Teams – If a married couple shares a cap, they must share an anniversary date.

- **Birthday** – Enter associate's birthday. For example, October 19, 1948 is entered as 10/19/1948.
- **Real Estate** – Enter the date the associate first received his/her real estate license. **This is not the date that the associate joined Keller Williams. This is the date they became a licensed agent.**

Associate Information

Completing the Commission Tab

Under the Commission Tab, the page contains the details regarding commission split and company dollar. This information will be determined by your office policies.

Associate Entry - Buyer Agent

File Edit Other Help

Read Save Clear

Associate **Commission** Profit Share

Commission and Splits

Commission Split %: 70

Base Commission Split %: 70 Company \$ CAP: 18,000.00

Royalty Split %: 100 Royalty Base CAP: 50,000.00

Commission EIN:
 (if different from SSN)

Company Name:

Deductions

	Type	Deduction	Account #	Amount
1	F	CHA01	B. Agent	10.00
2				
3				

Designations

Designations

Royalty Exception and Explanation

Transferring Agents

When an agent transfers from another market center, it will be up to your Team Leader and/or Operating Principal to determine if agent will keep their existing split structure.

*Associate Information***Step 1**


Enter the Commission Splits.

Associate	Commission	Profit Share
Commission and Splits		
Commission Split %:	<input type="text" value="70"/>	
Base Commission Split %:	<input type="text" value="70"/>	Company \$ CAP: <input type="text" value="18,000.00"/>
Royalty Split %:	<input type="text" value="100"/>	Royalty Base CAP: <input type="text" value="50,000.00"/>
Commission EIN: (if different from SSN)	<input type="text"/>	
Company Name:	<input type="text"/>	

- **Commission Split %** – Enter the current integer figure for the associate’s side of the commission split. (e.g., 70 for a 70/30 Associate; 60 for a 60/40 Associate; 100 for a 100% owner/broker, 100% Associate or non-licensed Market Center office staff).
- **Base Commission Split %** – Enter the base figure for the associate’s side of the commission split at the beginning of their anniversary year. This is used as a reference field if the Commission Split field is changed.
- **Co. \$ Minimum** – This is the Company Dollar cap this associate pays to your Market Center before switching to 100%.

NOTE: If the agent transferred to your market center from another market center, WinMORE will display a Question pop-up. If your market center OP has agreed to accept the agent’s prior market center Co \$ Anniversary Date and Co \$ paid towards this cap, click Yes. Otherwise click No and enter your full market center Co \$ cap amount.

Question ✕

 This associate shows an anniversary company dollar of 1,806.24 at another market center. Do we apply this amount to your market center? The new CAP amount would be 16,193.76. If you select Yes, please be sure to set the "MC Co\$ Anniv Date" to the date at the old market center (see the transfer form).

Remember to raise the company dollar amount back to the original cap amount for your Market Center on the anniversary date of this associate the following year.

*Associate Information***Step 2**

Enter the Royalty Split %. This is the percentage of the 6% franchise royalty paid by the associate. The Royalty Base CAP is the amount of GCI being charged with Royalty.

Associate	Commission	Profit Share
Commission and Splits		
	Commission Split %:	<input type="text" value="70"/>
Base Commission Split %:	<input type="text" value="70"/>	Company \$ CAP: <input type="text" value="18,000.00"/>
Royalty Split %:	<input type="text" value="100"/>	Royalty Base CAP: <input type="text" value="50,000.00"/>
Commission EIN: (if different from SSN)	<input type="text"/>	
Company Name:	<input type="text"/>	

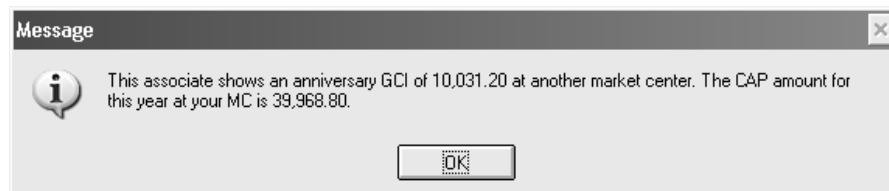
Franchise vs. Agent Royalty

According to the Franchise agreement, KWRI is paid royalty on the first \$50,000 (or whatever amount is stated in your Market Center's Franchise documents) paid in Gross Commission Income for each licensed associate in your Market Center.

Some Market Centers pay the full 6% or a portion of the 6% royalty for the associates. This is called *Franchise Royalty*. In most Market Centers, the 6% royalty is paid in full by the associates. Any royalty amount paid by the associates is considered *Agent Royalty*.

Note: The royalty payment is never waived.

If the agent transferred to your market center from another market center, WinMORE will automatically display a message as follows. Contact the prior MCA to find out if the agent is expected to close any contracts with the prior Market Center. Any future closings with the prior market center will affect this agent's Royalty Cap.



Remember to raise the GCI amount back to the original amount for your market center on the anniversary date of this associate the following year.

Associate Information

Special Note on Married Couples Sharing One Cap

WinMORE has to be set up differently for married couples depending on who closes what and when:

1. If a married couple splits all transactions 50/50, set up half caps of \$9000/\$25000 in each associates' record.
2. If only one spouse closes everything, put full caps in this spouse's record and zero caps in the other.
3. If they close transactions randomly, you will have to watch their GCI and Co \$ closings and anticipate in which DA they will cap. Before posting this DA, go into their Associate record and drop the caps so when you post the DA, it'll calculate correctly for both Co \$ and Royalty Base.

Note:

The cap amounts for your Market Center may be different.

This example is for a MC with a CO\$ Min= \$18,000 and GCI Minimum= \$50,000.

For example: With a husband and wife team, the husband closed and paid \$2500 Co \$ and GCI = \$8333.34; wife closed and paid \$12,000 and her GCI = \$40,000. Together they now have total Co \$ = \$14,500 and GCI = \$48333.34. The wife is about to close a transaction that will cap them. Change the husband's caps to \$2500/\$8333.34 and the wife to \$15,500/\$41666.66 and then post the DA. WinMORE will calculate the precise additional \$3500 Co \$ and \$1666.66 Royalty Base.

*Associate Information***Step 3**

Enter the Commission Tax ID (if different than the SSN). Mark if the associate is incorporated and if the associate's Employer Federal Tax ID number is entered in the Commission Tax ID field.

Associate	Commission	Profit Share
Commission and Splits		
	Commission Split %:	<input type="text" value="70"/>
Base Commission Split %:	<input type="text" value="70"/>	Company \$ CAP: <input type="text" value="18,000.00"/>
Royalty Split %:	<input type="text" value="100"/>	Royalty Base CAP: <input type="text" value="50,000.00"/>
Commission EIN: (if different from SSN)		<input type="text"/>
Company Name:		<input type="text"/>

Commission Tax ID

If this associate's Real Estate license is a corporation, partnership, etc., enter the legal entity's Tax ID #. This is the Tax # that will be used for the agent's IRS Form 1099. If this field is left blank, WinMORE uses the agent's Social Security # on the IRS Form 1099.

Note:

You will need to create a Company Record before entering the Commission EIN number.

*Associate Information***Step 4**

Enter the Deductions for the associate. Associates can authorize the Market Center to deduct either a flat rate or percentage from their commissions. Deductions entered on the Associate record will be recorded on every DA.

Deductions					Designations	
	Type	Deduction	Account #	Amount		
1	F	CHA01	B. Agent	10.00		
2						
3						

Note:

The Market Center must have written authorization for each deduction on file for each associate.

- **Type** – There are two types of deductions:
F - Flat-rate deduction
P - Percentage of the associate commission
- **Deduction ID** – Enter the recipient's ID number or press *ALT-DOWN* to open a look-up. Enter the ID number for the deduction recipient authorized by your associate.
- **Account #** – Enter this associate's account number for the *RECIPIENT ID #* just entered.

Note: This could be the associate's MLS ID# or the retirement fund's account number, depending on the nature of the deduction. For KW Cares, use the associate's name.

- **Amount** – Enter a dollar amount for a *Flat Rate* deduction. For example, enter 5.00 for a \$5.00 MLS fee. Enter a decimal fraction for a *Percentage* deduction. For example, enter .05 for a 5% deduction.

*Associate Information***Step 5**

Review the Royalty Exceptions and Explanations for the associate, if any.

	Type	Deduction	Account #	Amount		Designations
1	P	RET01	456789	.10		CRC
2						GRI
3						

Royalty Exception and Explanation	

Once the Month End – EOM Report – Royalty Exception report is printed, all Royalty Exceptions involving this associate appears in the first dialogue box.

The second dialogue box lists reasons for the Royalty Exception. For example, when an associate transfers from another KW market center to your market center and the Royalty Anniversary Date and Cap are modified, WinMORE automatically lists the reason for the difference.

You can also type explanations in the Explanation dialogue box.

Associate Information

Completing the Profit Share Tab

Under the Profit Share tab, you will find profit share/ direct deposit information, non-KW production for awards descriptions, and an area for miscellaneous notes.

The screenshot displays the 'Associate Entry - Buyer Agent' application window. The 'Profit Share' tab is selected, showing the following fields and sections:

- Profit Share / Direct Deposit:**
 - Bank Name: Bank of America
 - Bank Account Name: Buyer Agent
 - Routing Number: 113000023
 - Bank Account Number: 123789
 - Bank Account Type: Checking Savings
 - Profit Share EIN: (if different from SSN)
 - Company Name:
- Non-KW Production for Awards:**
 - Non-KW GCI:
 - Non-KW Units:
 - Transfer Description table with three empty rows.
- Notes:** A large text area for miscellaneous notes.

*Associate Information***Step 1**

Enter the Profit Share/Direct Deposit information.

Profit Share / Direct Deposit	
Bank Name:	Bank of America
Bank Account Name:	Buyer Agent
Routing Number:	113000023
Bank Account Number:	123789
Bank Account Type:	<input checked="" type="radio"/> Checking <input type="radio"/> Savings
Profit Share EIN: (if different from SSN)	
Company Name:	

It's a good idea to get a voided check from the agent for the account the associate wants to direct deposit profit share. Keep this information in the Associate's File Folder in a locked drawer.

- **Bank Name** – Enter the associate's bank name.
- **Account Name** – Enter the associate's bank account name.

Note: The default is the First and Last Names entered on Page 1. This field should match the account name on the voided check.

- **Routing Number** – Enter the associate's bank's routing number.

Note: Use the routing number shown on a voided check. Do not use a deposit slip for this information. Some banks use several different routing numbers for deposits versus direct deposits. When in doubt, call the bank and ask.

- **Bank Account#** – Enter the associate's bank account number.
- **Bank Account Type** – Select Checking or Savings.
- **Profit Share SSN/EID** – Enter the tax ID # associated with this bank account. If this field is left blank, the Profit Share 1099 sent by KWRI to the associate will use the associate's Social Security Number as entered on the Associate page. If this bank account is in the name of the associate's corporation, enter the corporate TIN.

Note: You will need to create a Company Record before entering the Profit Share EIN number.

*Associate Information***Step 2**

Enter the associate's gross closed income (GCI) and Units closed with their prior broker(s) within this calendar year.

Non-KW Production for Awards	
Non-KW GCI:	<input type="text"/>
Non-KW Units:	<input type="text"/>
Transfer Description	
<input type="text"/>	
<input type="text"/>	
<input type="text"/>	

Note: Enter the prior broker's name and detail on the Transfer GCI & Units entered as approved by your TL.

The Annual KWRI Awards includes the associate's entire year of total closed units.

Note: Do NOT enter KW GCI and Units! If this associate transferred from another Keller Williams market center, KWRI automatically combines KW GCI and Units by Social Security Number. Only enter non-KW individual production information here.

Step 3

Enter any miscellaneous associate notes.

Notes
<input type="text"/>

Associate Information

Saving an Associate Record

Carefully review your entries for the entire Associate file before saving. Remember, a correct *Sponsor ID* is critically important because of our profit sharing system.

If all entries are correct, click the Save button to save this record.

Associate Entry - Buyer Agent

File Edit Other Help

Read Save Clear

Associate Commission Profit Share

Profit Share / Direct Deposit

Bank Name: Bank of America

Bank Account Name: Buyer Agent

Routing Number: 113000023

Bank Account Number: 123789

Bank Account Type: Checking Savings

Profit Share EIN: (if different from SSN)

Company Name:

Non-KW Production for Awards

Non-KW GCI:

Non-KW Units:

Transfer Description

Notes

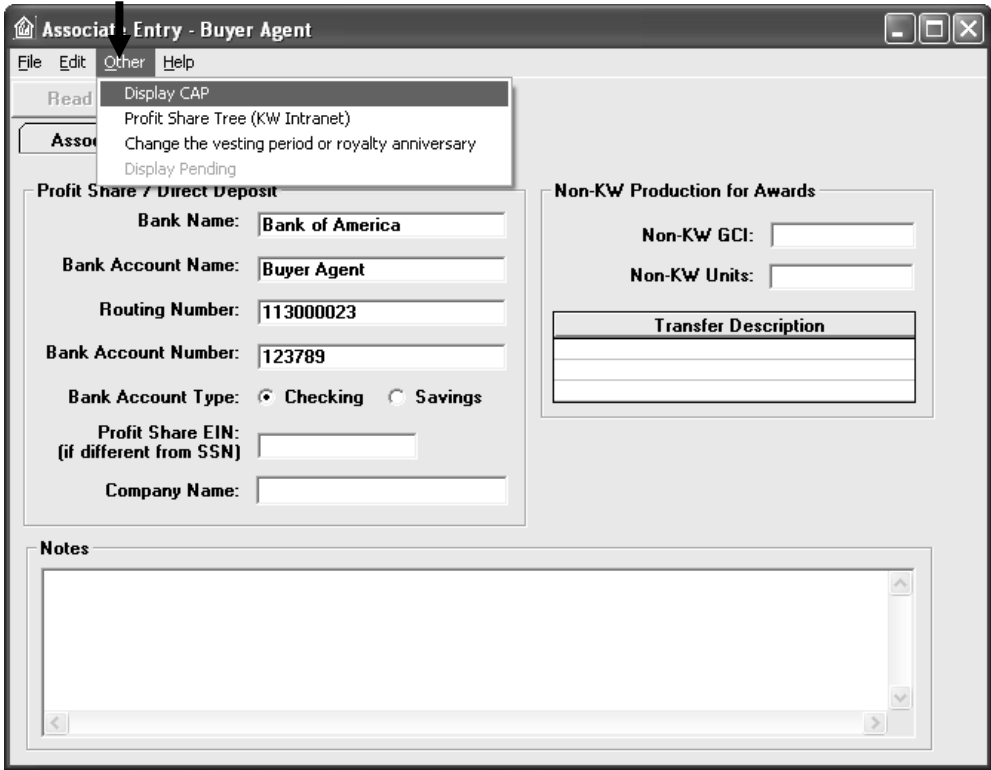
IMPORTANT NOTE!!

If a new associate is a Team or Group member, immediately go to Enter Team & Group Award Entry and set them up on the Team or Group BEFORE POSTING ANY DAs for this associate!

Associate Information

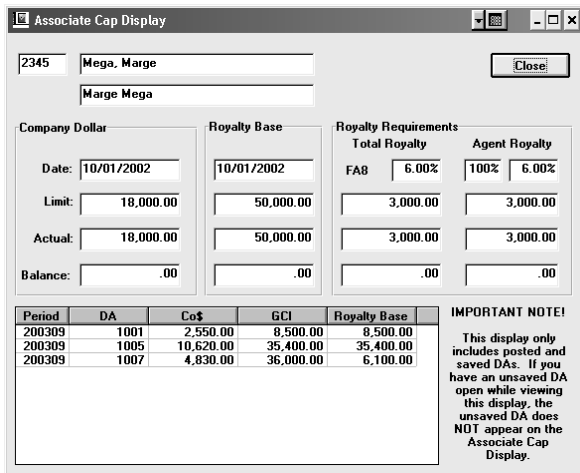
Other Menu

Click Other and the following choices display.



Display CAP

This feature displays the associate's Cap position and is the same pop-up as is available through the DA.



Associate Information

Other Menu, cont.

Profit Share Tree (KW Intranet)

Click to link to the KW Intranet to view the KW Profit Share Tree Search. If you have an Associate record open at the time, this associate's KW PS Tree information is displayed.

Change the vesting period or royalty anniversary

This function requires a password. Email KWMCAngel@kw.com for a password of the day for a particular associate. This feature is used to make corrections to the Start Month, Start Year, or Royalty Anniversary Date.

Questions?

Please email KWMCAngel@kw.com

