L O O M   R E A L T Y

BOR / DO Agreement and Go-Live Checklist

Everything required to take a Loom Realty Broker of Record or Designated Officer account live. | Version 2.0 | August 18, 2026

Work top to bottom. An account is not live, and no licensed activity may be conducted under the engagement, until every item that applies to the elected structure and scope is complete and filed in the Client Portal.

Reading the Required by column

Required by CA law means a California statute or regulation, or a document the DRE requires as part of a filing. If it is not done, the filing fails or the activity is unlawful.

Required by Loom means a Loom Realty engagement requirement. California does not compel it. We require it because the designated broker carries the licence that everything here runs on, and because these are the items that turn into problems at audit. Any Loom item can be discussed before signing; none can be quietly skipped afterwards.

Where a line applies only in some circumstances, the Applies to column says so. Do not complete items that do not apply to the elected structure or scope.

Account

Field	Detail
Client legal entity	
Primary contact / title	
Structure elected (Section 2.1)	Designated Officer / Broker of Record / Other
Service scope elected (Section 2.2)	Property Management & Leasing / Real Estate Sales / Full Service / Other
Holds or will hold trust funds	Yes / No
Has employees	Yes / No
Target go-live date	
Prepared by / date	

1. Loom Realty Agreement Package

	Item	Required by	Applies to	Done	Date
☐	BOR / DO Master Service Agreement, fully executed	Loom	All		
☐	Section 2.1 structure election and Section 2.2 scope election completed	Loom	All		
☐	Fee Schedule attached to the executed copy	Loom	All		
☐	Payment Authorization completed (Exhibit B)	Loom	All		
☐	Trust Fund Addendum executed	Loom	If trust funds		
☐	Trust Account Register completed and returned	Loom	If trust funds		
☐	Compliance and Audit Support Addendum executed	Loom	All		
☐	Workers Compensation Waiver Addendum executed	Loom	If no employees		
☐	Countersigned copies returned to Client and filed in the Portal	Loom	All		

2. Client Entity Records

	Item	Required by	Applies to	Done	Date
☐	Articles of Incorporation or Articles of Organization	CA law	All		
☐	Certificate of Status from the Secretary of State, executed within the last 30 days, or Articles filed within the last 6 months	CA law	DO		
☐	Fictitious business name filing from the County Clerk	CA law	Only if trading under a name other than the entity name		

	Item	Required by	Applies to	Done	Date
☐	Statement of Information filed and current	CA law	All		
☐	EIN confirmation letter	Loom	All		
☐	Bylaws or Operating Agreement	Loom	All		
☐	Entity type confirmed suitable for the elected structure	Loom	All		

3. Licensing and DRE Filings

Live Scan is tied to a licence application, not to this engagement. A person who already holds an active California licence does not repeat it when affiliating with a new broker.

	Item	Required by	Applies to	Done	Date
☐	Active DRE licence number and status verified for every person conducting licensed activity	CA law	All		
☐	Live Scan fingerprints submitted to the DOJ	CA law	Only for a person applying for an original licence, including a DO not yet licensed		
☐	Corporation Licence Application (RE 201) submitted, with the licence fee for each broker-officer	CA law	DO		

	Item	Required by	Applies to	Done	Date
☐	Corporation Background Statement (RE 212)	CA law	DO, only where a director, officer, or holder of more than 10% has a history enumerated in Regulation 2746		
☐	Board resolution appointing the designated officer	CA law	DO		
☐	Certified copy of any board resolution assigning supervision to a broker-officer, filed with the Commissioner within 5 days	CA law	DO, only if supervision is assigned		
☐	Salesperson Change Application (RE 214) filed for each affiliated salesperson	CA law	BOR, and DO where salespersons are licensed to the corporation		
☐	Branch Office Application (RE 203)	CA law	Only if operating a branch office		
☐	DRE confirmation or acknowledgement received	CA law	All		
☐	Advertising shows the licensee's 8-digit licence number and the responsible broker name: website, signage, listings, social, email signatures	CA law	All		
☐	Government photo ID for each principal	Loom	All		
☐	Record retention practice confirmed: 3 years under B&P 10148	CA law	All		

4. Insurance

California does not require errors and omissions or general liability cover for a real estate licensee. Loom Realty requires it because the designated broker is exposed to every claim arising from activity under the licence. Workers compensation is the exception: it is required by state law wherever there are employees.

	Item	Require d by	Applies to	Done	Date
☐	Workers Compensation at statutory limits	CA law	If Client has employees		
☐	Errors and Omissions, $1M per claim / $2M aggregate	Loom	All		
☐	Commercial General Liability, $1M / $2M	Loom	All		
☐	Loom Realty and Kayla Bramante named Additional Insured by endorsement, and named certificate holder	Loom	All		
☐	Waiver of subrogation and primary / non-contributory wording	Loom	All		
☐	Cyber Liability, $1M per claim	Loom	If handling tenant or owner personal information		
☐	Individual licensee E&O election recorded (Option A or Option B)	Loom	All		
☐	Carrier AM Best rating A- or better	Loom	All		
☐	Certificate of Insurance uploaded and renewal date diarised	Loom	All		

5. Trust Funds

Complete this section only where Client receives, holds, or disburses trust funds. Most of it is state law, not preference.

	Item	Required by	Applies to	Done	Date
☐	Trust account held at a California depository and titled as a trust account (10 CCR 2832)	CA law	If trust funds		
☐	Account is non interest bearing, unless 10 CCR 2830.1 is satisfied in full	CA law	If trust funds		
☐	Kayla Bramante established as an authorized signatory (10 CCR 2834)	CA law	If trust funds		
☐	Written authorization from Broker on file for every other signer (10 CCR 2834)	CA law	If trust funds		
☐	Fidelity bond at or above the maximum trust funds accessible to any unlicensed signer (10 CCR 2834)	CA law	Only if an unlicensed person can withdraw		
☐	Columnar record and separate beneficiary records in place (10 CCR 2831, 2831.1)	CA law	If trust funds		
☐	Monthly reconciliation process confirmed (10 CCR 2831.2)	CA law	If trust funds		
☐	Copy of the executed bank signature card delivered to Broker	Loom	If trust funds		
☐	Trust Account Register Parts A to E completed	Loom	If trust funds		
☐	First reconciliation due date agreed with Client and bookkeeper	Loom	If trust funds		

6. Billing

	Item	Required by	Applies to	Done	Date
☐	Onboarding fee paid	Loom	All		
☐	First monthly service fee paid	Loom	All		
☐	Recurring subscription created and verified in Stripe	Loom	All		

	Item	Required by	Applies to	Done	Date
☐	Payment method valid and not expiring within 60 days	Loom	All		
☐	Billing anniversary recorded	Loom	All		
☐	Activity based fees explained and acknowledged	Loom	All		

7. Client Portal

	Item	Required by	Applies to	Done	Date
☐	Portal account created and invitation accepted	Loom	All		
☐	Executed agreement and all addenda uploaded	Loom	All		
☐	Current Fee Schedule version uploaded	Loom	All		
☐	Insurance certificates uploaded	Loom	All		
☐	Entity and DRE records uploaded	Loom	All		
☐	Monthly reporting cadence set and first check-in scheduled	Loom	All		
☐	Compliance manual and form library access granted	Loom	All		

Go-Live Authorisation

Licensed activity may begin under this engagement only when every applicable item above is complete and the DRE filings required for the elected structure have been made.

Confirmation	Detail
All applicable items complete	Yes / No
Outstanding items and agreed dates	
Approved by (Broker)	Kayla Bramante, Broker / Designated Officer, CA DRE #02017652

Confirmation	Detail
Signature / date	
Account live as of	

This is a readiness and onboarding tool. It is not legal, tax, accounting, insurance, or DRE filing advice. Requirements depend on entity type, activities, personnel, locations, and current law, and the DRE updates its forms and instructions from time to time. Use the current DRE forms and consult qualified counsel where needed.

Loom Realty, BOR / DO Agreement and Go-Live Checklist, Version 2.0. Statutory and regulatory references current as of August 2026. · CA DRE #02017652 · 26565 Agoura Road, Suite 200, Calabasas, CA 91302 · (310) 906-5459 · loomrealty.com