

Broker of Record / Designated Officer Client Intake Form

Everything Loom Realty needs to prepare your agreement and DRE filings. | Version 1.0 | August 2026

Before you start

Complete every field that applies. This form replaces re-entering the same information across the service agreement, the addenda and the DRE forms. Fields you leave blank will come back to you as questions, so it is faster to gather the records first. Save the completed file and return it to hello@loomrealty.com, or upload it in the client portal.

1. Engagement

Engagement structure (select one)

☐ Designated Officer ☐ Broker of Record (interim) ☐ Other

If interim, intended transition

Target transition date

Service scope (select one)

☐ Property Management & Leasing ☐ Real Estate Sales ☐ Full Service

If Other scope, describe

Target go-live date

2. Entity

Legal entity name

Entity type (Corporation, LLC, LP, Sole Prop.)

State of formation

CA Secretary of State number

CA SOS status

Federal EIN

Fictitious business name / DBA (if any)

Physical business address (no P.O. boxes)

Mailing address (if different)

3. Contacts

Primary contact name

Title / role

Phone	Email
Secondary contact name	Title / phone / email
Billing contact name	Billing email (invoices)

4. Business Profile

Number of properties managed	Total doors / units	California counties served
Annual property management gross revenue	Projected annual BOR / DO revenue	
Current operating status		
☐ Preparing to launch	☐ Managing only owned property	☐ Managing for other owners
☐ Leasing only	☐ Sales only	☐ Mixed
Current broker of record or designated officer, if any	Reason for change	

5. Licensees

List every person who will conduct licensed activity under this engagement. E&O option A means the licensee is scheduled on the company policy; option B means an individual policy.

Licensee 1 name	DRE licence number	Type / expiry	E&O option (A or B)
Licensee 2 name	DRE licence number	Type / expiry	E&O option (A or B)
Licensee 3 name	DRE licence number	Type / expiry	E&O option (A or B)
Licensee 4 name	DRE licence number	Type / expiry	E&O option (A or B)
Unlicensed staff who will have trust account access			

6. Trust Funds

Will the company receive, hold or disburse trust funds?

☐ Yes ☐ No

If yes, the Trust Fund Addendum is mandatory and must be executed before any trust funds are received.

Bank name	Account type	Number of trust accounts
Exact account title as it appears at the bank		
Who prepares the monthly reconciliation	Bookkeeper / accountant name and contact	
Approximate trust balance currently held	Fidelity / crime bond amount, if any	

7. Insurance

Insurance broker / agency		Agent name, phone, email
E&O carrier and policy number	E&O limits	E&O expiry
CGL carrier and policy number	CGL limits	CGL expiry
Workers compensation		
☐ In place ☐ Waiver addendum, no employees ☐ Pending		
Cyber liability limit, if any	Crime / fidelity bond limit, if any	
Loom Realty and Kayla Bramante added as additional insured by endorsement?		
☐ Yes ☐ Requested ☐ Not yet		

8. Compliance History

Any prior or pending DRE complaint, investigation, audit or enforcement action against the company or any licensee?

☐ Yes ☐ No

Any prior or pending litigation relating to real estate activity?

☐ Yes ☐ No

Has a previous broker of record or designated officer engagement ended for cause?

☐ Yes ☐ No ☐ Not applicable

If you answered Yes to any of the above, describe fully. Non-disclosure is a material breach.

9. Billing

Payment method

☐ ACH

☐ Credit card

Name on account

Billing address

Do not write full bank or card numbers on this form. Payment details are entered directly in the secure Stripe checkout link we send after this form is received.

10. Acknowledgements

☐ I have read what Loom Realty does not do

☐ Trust Fund Addendum applies to us if we hold trust funds

☐ The information given here is accurate and complete

☐ I understand this is not legal, tax or insurance advice

Signature (type full name)

Title

Date

What happens next

We review this form, confirm the structure and scope, and send the Broker of Record / Designated Officer Master Service Agreement pre-filled with these details, together with any addenda that apply. Nothing goes live until the go-live checklist is complete.