

# Personal Assistant Do's and Don'ts

Unlicensed Assistants must follow the guidelines per the Illinois Real Estate License Act and SentiLock Unlicensed Assistant Card User Agreement. The following are Do's and Don'ts that will guide assistants to stay compliant with the law and agreement:

## An unlicensed assistant of a licensee may:

1. Answer the telephone, take messages and forward calls to a licensee;
2. Submit listings and change to a multiple listing service;
3. Follow up on a transaction after a contract has been signed;
4. Assemble documents for a closing;
5. Secure public information from a courthouse, sewer district, water district or other repository of public information;
6. Have keys made for a company listing;
7. Draft advertising copy and promotional materials for approval by a licensee;
8. Place advertising;
9. Record and deposit earnest money, security deposits and rents;
10. Complete contract forms with business and factual information at the direction of and with approval by a licensee;
11. Monitor licenses and personnel files;
12. Compute commission checks and perform bookkeeping activities;
13. Place signs on property;
14. Order items of routine repair as directed by a licensee;
15. Prepare and distribute flyers and promotional information under the direction of and with approval by a licensee;
16. Act as a courier to deliver documents, pick up keys, etc.;
17. Place routine phone calls on late rent payments;
18. Schedule appointments for the licensee (this does not include making phone calls, telemarketing or performing other activities to solicit business on behalf of the licensee);
19. Respond to questions by quoting directly from published information;
20. Sit at a property for a broker tour that is not open to the public;
21. Gather feedback on showings;
22. Perform maintenance, engineering, operations or other building trades work and answer questions about that work;
23. Provide security;
24. Provide concierge services and other similar amenities to existing tenants;
25. Manage or supervise maintenance, engineering, operations, building trades and security; and
26. Perform other administrative, clerical and personal activities for which a license under the Act is not required.

## An unlicensed assistant of a licensee may not:

1. Host open houses, kiosks, or home show booths or fairs;
2. Show property;
3. Interpret information on listings, titles, financing, contracts, closings or other information relating to a transaction;
4. Explain or interpret a contract, listing, lease agreement or other real estate document with anyone outside the licensee's company;
5. Negotiate or agree to any commission, commission split, management fee or referral fee on behalf of a licensee; or
6. Perform any other activity for which a license under the Act is required.

## SentiLock Unlicensed Assistant Card User Agreement

### SECURITY OF SENTICARD: SentiLock User agrees:

- To keep the SentiCard in the SentiLock User's possession or in a secure place at all times;
- To not allow your PIN number (or personal ID Number) to be attached to the SentiCard;
- To not provide access to your SentiCard to any person, for any purpose whatsoever, or permit the SentiCard to be used for any purpose by any other person;
- To follow any additional security procedures as may be specified by MORE;
- To immediately return the SentiCard and reader to the appropriate Broker upon termination/resignation of employment with such agent/office.

### I UNDERSTAND:

- SentiCard access is to be used only for the lockboxes owned by the REALTOR® indicated on my SentiLock User Agreement;
- That I may not show property and that access to lockboxes is for administrative purposes only;
- That I only have the ability to open the key compartment and shackle for the REALTOR® indicated on my SentiLock User Agreement.

Please note: The REALTOR® who supervises an unlicensed assistant is responsible for the assistant and could be subject to a fine of up to \$5,000 if the assistant violates the SentiLock User Agreement.