



To: Outside Real Estate Agents

From: Smith Ranch Homes

RE: Selling/Buying Properties at Smith Ranch Homes

REVISED: 9/15/2022

Thank you for choosing to work with Smith Ranch Homes as you represent a seller or a buyer in the listing or purchase of their home. We understand the real estate industry is often times fast paced and fluid and we promise to do our best to ensure your experience selling or buying a unit is as seamless as possible. However, please understand because we are a highly serviced, gated residential community, Smith Ranch Homes requires specific rules as you go about your business.

Although more detail regarding Open Houses, signage and contractor work can be found in the Outside Agent registration materials, important guidelines in the early stages of your business include:

1. Selling Agents must be registered with the Association.

Please contact the Patrol Services Manager for all registration materials form at 415-492-4909, via email at patrolmanager@smithranchhomes.org or in-office visit next to the Resident Services Desk during normal business hours. Registration materials must be signed also be signed by the Selling Agent's SRH client.

2. Once registered, Selling Agents will be issued a parking pass (valid for six months) and an Agent ID badge. **Both must be displayed at all times while on property.**
3. Lock boxes are permitted and may be placed directly on unit doors. Smith Ranch Homes does not maintain an inventory of resident keys – keys must be provided to the Selling Agent by the homeowner, or if not available, duplicate keys may be produced by submitting a Smith Ranch Homes work order to our Maintenance Department (2-3 business day turnaround time is expected).
4. Buying Agent and prospective client site visits must be provided to the Smith Ranch Homes Gatehouse with the following information:
 - a. Buying Agent & Client Names
 - b. Arrival Date and Estimate Time
 - c. Number of Vehicles

The Selling Agent does not need to be onsite to allow Buying Agent/Client onto property, however it is necessary the Selling Agent is the person who informs the Gatehouse as they are the registered Agent and responsible for Buying Agent/Client actions while onsite.

5. Clients must be accompanied by a Buying or Selling Agent at times while onsite. Unattended clients may wait for an Agent in the Plaza or Clubhouse.
6. **Patrol Services are not permitted to open units or provide cart rides to Agents or Client.**
7. Agents and Client are permitted to tour, but not use Smith Ranch Homes amenities, including dining facilities, pool, etc.
8. Although unaffiliated with Smith Ranch Homes, our onsite contract Coldwell Banker team may be helpful in providing you agent-related information at 415-259-5800.

We look forward to working with you! Please contact the Resident Services Manager if you have any questions at 415-492-4938.

OUTSIDE REAL ESTATE AGENT REGISTRATION PROCEDURES

(Reviewed: 9/15/2022)

- STEP 1:** Obtain all documents from Smith Ranch Homes: Patrol Services Manager Office or SRH Website.
- STEP 2:** Complete all registration documents with necessary signatures.
- STEP 3:** Return all documents to the Patrol Services Manager Office or email to *patrolmanager@smithranchhomes.org*.
- STEP 4:** Pick up Agent ID Badge and Parking Pass from the Patrol Manager Office. Your appointment will be scheduled by the Patrol Manager.



OUTSIDE REAL ESTATE AGENT REGISTRATION FORM

I, _____ (name of Agent), having entered into a listing agreement for the sale of Unit _____ located at _____ Deer Valley Road, San Rafael, California, do herewith understand and agree that my access to Smith Ranch Homes to provide real estate services is conditioned upon my compliance with all of the following terms:

1. I understand and agree that I am not an employee of Smith Ranch Homes Homeowners Association (SRH), which exercises no control over the real estate services that I provide or the methods by which I provide those services.
2. I agree not to represent to any person at any time that I am an employee of SRH.
3. I understand and agree that your SRH Client (resident/trustee) shall be responsible for all association fees related to my services.
4. I agree to release, indemnify, and hold SRH harmless from and against any and all damages arising out of or related to my services as an Agent, unless such damages result directly from the negligence of SRH.
5. I understand and agree that my access to SRH is limited to that access which is necessary to provide real estate services to the homeowner.
6. I understand that I must display the Agent ID Badge at all times while in the common areas of Smith Ranch Homes.
7. I agree to abide by the SRH'S Outside Real Estate *Rules of Conduct* and any other rules, regulations, policies or procedures that SRH develops regarding the conduct of Outside Real Estate Agents.

By signing below, I agree to the terms of this Outside Real Estate Agent Registration Form and I acknowledge receipt of Smith Ranch Homes' Outside Real Estate Rules of Conduct.

Signature

Print Name

Date

OUTSIDE REAL ESTATE AGENT RULES OF CONDUCT

Smith Ranch Homes permits Outside Real Estate Agents (Agents) to provide services to homeowners in the normal course of listing, showing and selling units at Smith Ranch Homes. Agents must comply with all provisions of the governing documents including the rules and regulations developed by Smith Ranch Homes.

AGENT ACCESS TO SMITH RANCH HOMES PROPERTY IS CONDITIONED ON THE FOLLOWING AND MUST BE FOLLOWED AT ALL TIMES:

REGISTRATION

1. Selling Agents must complete and return the Outside Real Estate Agent Registration Form to the Patrol Services Manager.
2. Obtain a 6-month parking pass from the Patrol Services Manager.
3. Obtain an Agent ID badge from the Patrol Services Manager.
4. Parking Passes and Agent ID badge must be displayed at all times while on the property.

BUYING AGENTS/CLIENTS

1. Buying Agent and prospective client site visits must be provided to the Smith Ranch Homes Gatehouse (415-492-4910) with the following information:
 - a) Buying Agent & Client Names
 - b) Arrival Date and Estimate Time
 - c) Number of Vehicles

NOTE: Gatehouse staff does not distribute Agent's literature.

The Selling Agent is not required to be onsite to allow Buying Agent/Client onto property, however it is necessary the Selling Agent is the person who informs the Gatehouse as they are the registered Agent and responsible for Buying Agent/Client actions while onsite.

2. Clients must be accompanied by a Buying or Selling Agent at times while onsite. Unattended clients may wait for an Agent in the Plaza or Clubhouse.
3. Patrol Services are **not** permitted to open units or provide cart rides to Agents or Client, as well as **not** send clients to units, nor notify the agents of client arrival
4. Agents and Client are permitted to tour, but not use Smith Ranch Homes amenities, including dining facilities, pool, etc.

OUTSIDE REAL ESTATE AGENT RULES OF CONDUCT

LOCK BOXES

1. Lock boxes are permitted and may be placed directly on unit doors.
2. If a key box is not provided, the Agent must have a key to the unit.
3. Smith Ranch Homes does not maintain an inventory of resident keys – keys must be provided to the Selling Agent by the homeowner, or if not available, duplicate keys may be produced by submitting a Smith Ranch Homes work order to our Maintenance Department (2-3 business day turnaround time is expected).
4. **Patrol Services will not open units for the Agent or Clients.**

MARKETING

1. Agents are not permitted to place literature or marketing material in the resident cubbies in the SRH Mailroom.
2. Agents may post a single flyer on the bulletin board adjacent to the SRH Beauty Salon for up to thirty days. The flyer must be initialed and dated.
3. Agents and Client are permitted to tour, but not use Smith Ranch Homes amenities, including dining facilities, pool, etc.
4. Although unaffiliated with Smith Ranch Homes, our onsite contract Coldwell Banker team may be helpful in providing you agent-related information at 415-259-5800.

OPEN HOUSE PROCEDURES

1. Agents **must** contact the Resident Services Manager to notify Smith Ranch Homes of the intended Open House at least **two business days** (Monday through Friday) prior to conducting an Open House.
2. Agents **may** advertise an Open House provided they include a provision to “call first”. This will allow the Agent to identify the interested party in advance of their arrival at SRH and notify the Gatehouse at (415) 492-4910.
3. Open Houses at Smith Ranch Homes does not mean that anyone can walk onto the property. All attendees must be identified, announced and accompanied by the Agent while on the property, with information provided to Patrol Services.
4. Smith Ranch Homes’ contract Coldwell Banker team, an onsite independent broker, may arrange an escorted Open House for outside brokers, with lists of guests to Patrol Services.

OUTSIDE REAL ESTATE AGENT RULES OF CONDUCT

SIGNAGE

1. One (1) "For Sale" or "For Rent" sign may be displayed from within a unit available for sale or rent.
2. Open House signs may only be posted while the Selling Agent is on site showing the unit.
3. Open House signs may be placed in order to facilitate directing interested persons to the location of the open unit.

CONTRACTOR WORK

1. Readyng the unit for sale often includes interior remodeling or other contractor work. Please be sure to adhere to Smith Ranch Homes' Construction Contractor Guidelines – available at the Resident Services Desk.
2. All Smith Ranch Homes units includes red Emergency Call Switches (ECS). When switched, these units can provide an alert to the Smith Ranch Homes Gatehouse for wellness check services. These switches are tied into the unit/building wiring and must not be adjusted by any contractor. Repair costs resulting in contractor damage will be overseen by Smith Ranch Homes but the responsibility of the homeowner.
3. Structural alterations shall not be made without prior written approval of the Association. Requested plumbing or electrical work to be done within any bearing or common wall shall not be performed without prior written approval. Applications are to be submitted to the Architectural Committee before any work is undertaken.
4. Without Association approval, an Owner may make alterations or improvements within the boundaries of his/her Unit* that do not impair the structural integrity or mechanical/electrical systems, increase noise transmission, lessen the support of any part of the Property, or impair the value or desirability of other Units. All other improvements shall require Association approval. * See Article 1.22 of the First Restated CC&Rs for Smith Ranch Homes (Tab 15) for further clarification.
5. See Smith Ranch Homes Architectural Policy for more information regarding unit alternations.

MEET & GREET

Smith Ranch Homes encourages all Agents to schedule an appointment with the SRH General Manager (415-492-4916) to meet and greet a new resident prior to close of escrow.



**OUTSIDE REAL ESTATE AGENT
CODE OF CONDUCT ACKNOWLEDGEMENT**

I have read and understand *Smith Ranch Homes' Outside Real Estate Agent Code of Conduct*

Signature

Print Name

Date

Email

Telephone

Address

City

State

Zip Code

DRE #

Vehicle Make

Vehicle Model

Vehicle Color

Vehicle License Plate Number

Auto Insurance Carrier

Auto Insurance Policy Number

Representing:

Smith Ranch Homeowner

SRH Unit Number

**OUTSIDE REAL ESTATE AGENT
SMITH RANCH HOMES HOMEOWNER REGISTRATION**

I wish to register _____ as my Outside Real Estate Agent, who will provide services to me in my residence at Smith Ranch Homes, located at:

_____ Deer Valley Road, Unit _____, San Rafael, California

I understand and agree that his/her access to Smith Ranch to provide services is conditioned upon compliance with all of the following terms.

1. I understand and agree that he/she is not an employee of Smith Ranch Homes Homeowners' Association (SRH), which neither exercises control over the care provided to me at SRH or the method(s) by which such care is provided, such control being my personal responsibility.
2. I understand and agree that I am solely responsible for the payment for agent-related services provided to me by Smith Ranch Homes.
3. I agree to release, indemnify, and hold SRH harmless from and against any and all damages arising out of or related to the services provided to me, unless such damage results directly from the negligence of SRH.
4. I understand and agree that access to SRH for my Agent is solely limited to that access which is necessary to provide services to me.
5. I agree to ensure that my Agent abides by the SRH Outside Real Estate Agent *Code of Conduct* and any other rules, regulations, policies or procedures that SRH develops regarding the conduct of the Agent/Broker.
6. I agree to notify the Association when terminating the Agent services.

By signing below, I agree to the terms of this Acknowledgement and Indemnification and I acknowledge receipt of the following:

1. Rules of Conduct for Agent/Brokers
2. Agent-signed Outside Real Estate Agent Registration Form.

Homeowner Signature

Print Name

Email

Telephone

Address

City

State

Zip Code

Return to the Patrol Services Manager