**Article #3 REALTOR® Safety Forms: More than Just Space Filler**

By Tracey Hawkins

As agents you are more than likely overwhelmed with paperwork and documents. However, there are a few key documents that are often overlooked, that every agent should have in their arsenal that may very well save your life or help in an emergency situation. It should be standard practice to make sure the forms are being completed and updated.

As agents you are independent contractors. These days many agents don’t go into the office regularly. However, you need to keep in mind that you are still contracted with and connected to your real estate sales office. The support staff there can help you stay safe while you work. You already follow safety procedures sharing your whereabouts, right? What if the unthinkable happens and law enforcement officials need information to search for you? Does your Managing Broker or office staff know what kind of vehicle you drive, or its color? Is your license plate number on file? Would they be able to reach a family member? Does anyone know if you have allergies or other medical concerns? The solution is to complete an **Agent Information Form <** **http://www.realtor.org/sites/default/files/applications-and-forms/2011/migration-undated/realtor-safety-agent-id-custom-form.doc>**which, once completed will contain crucial family contact information and pertinent information about you and your vehicle in case of an emergency. Be sure you complete one and keep it updated regularly.

Another top safety tip that I stress to busy agents is to make sure someone knows where you are at all times. The easiest way to make this happen is to utilize an **Agent Itinerary Form <** **http://www.realtor.org/sites/default/files/applications-and-forms/2011/migration-undated/realtor-safety-agent-itinerary-custom-form.doc>**. The form requires you to take a few minutes to list your client’s information, the showing time frame, your contact info during that time, and addresses of where you will be showing (attach a MLS printout to the form). It seems like a lot of extra work, but this form will be invaluable if you become missing. It will allow office staff to hand a photo of who you are with and where you have been to the authorities. Law enforcement officials will be able to retrace your footsteps. Since someone knows when you are expected back, if you don’t show up on time, you will be immediately missed. Calls can be made to your phone to check in and if things need to be escalated law enforcement officials can be called. Time is of the essence in these situations, so it is important to make sure the form is complete and accurate. If you change any part of it, let your office know the change in plans. Allow would-be buyers to see you complete the Agent Itinerary Form. Make sure they see you leave it on your desk. That alerts them to the fact that their information is on file. It also reminds them that their photo is in your office in case they decide to commit a crime. They know it will be in law enforcement official’s hands. Seeing you list return times sends a signal that if you don’t come back on time, you will be missed. It is a powerful deterrent.

A key component of the Agent Itinerary Form is the completion of the **Prospect Identification Form <** **http://www.realtor.org/sites/default/files/applications-and-forms/2011/migration-undated/realtor-safety-prospect-id-custom-form.doc>**. This form tells not only you, who your client is but can be used by law enforcement officials to find a possible perpetrator if you are victimized. Your office is the ideal place to have new clients complete this form. The form asks for a photo ID. Many agents hesitate to ask for this key piece of information. A professional way to request it is to let your clients know that in the interest of time, you will copy their license as they complete the rest of the form. Point out the section on the form that requires an ID that will help them understand that it is a part of the process. People have to show their IDs to write a check or to rent a car, they should not object to providing one when making the biggest purchase of their lives. If they do, red flags should go up. This is an expected part of the home-buying process and legitimate buyers should have no problem with it. And if you work with a lender who has already verified identity you should still have the client fill out the Prospect Identification Form for your own records.

Finally, every real estate sales office should review the **Office Safety Action Plan <** **http://www.realtor.org/sites/default/files/applications-and-forms/2011/migration-undated/realtor-safety-action-plan-sample.doc>** with new agents and againon a regular basis with the entire staff. This plan is a customizable, check-list of basic safety procedures agents should be following. It should be stressed that these are highly recommended, although not required, to ensure agent safety. The “*distressed code system*” conversation should include details of making such a plan work. Be sure to discuss what the code is, stress the need for a location to be a key part of the plan and think through the steps that will be taken if action is needed. The “*buddy system*” is best if it is accompanied by a list of agents who are willing to accompany fellow agents who do not want to meet a client alone.

As agents you make your living showing strangers empty houses. Utilize the forms provided by NAR at REALTOR.org/Safety to remove some of the danger from your job when working with new clients. The few extra minutes that you spend to complete them, could be the difference between life and death.

<Interactive Poll Questions:>

1. Does your office have a similar system in place?
2. Will you consider implementing a system like this now that you are aware of it?

*Source: Tracey Hawkins aka “Tracey, the Safety Lady” is a former real estate agent and has been teaching agent safety over the last 18 years. In 1995 Hawkins founded Safety and Security Source in Kansas City, Missouri and presents on topics including personal, home, auto, and real estate safety. She conducts training on these topics and more during webinars, expos, and live seminars around the United States. Hawkins was recently chosen as one of Kansas City’s Most Influential Women.*

Visit NAR’s REALTOR® Safety website at REALTOR.org/Safety for more tips, articles, videos, and webinars.

This article is part of the NATIONAL ASSOCIATION OF REALTORS® 2013 REALTOR® Safety article series.