

2026



AGENT MARKETING PLAN



DEAR AGENTS,

Every great business begins with a plan. Dedicating time now to map out your marketing strategy can help you stay focused and intentional in the year ahead.

From vision to action, this workbook is designed to be your guide – a place to clarify your vision, outline your goals and put actionable strategies into motion. As you work through it, I encourage you to think boldly about the legacy you want to build and the impact you want to make. The time you put in now can pay dividends in the

form of stronger relationships, more opportunities and greater results throughout 2026.

Remember, you’re backed by more than your Field Marketing team. With Coldwell Banker Realty, you have an entire network of support behind you, from marketing and operations to leadership and learning, every single day of the year. Whether it’s January 1 or December 31 and every moment in between, we’re here to help you sharpen your strategy, strengthen your presence and seize every opportunity that comes your way.

Here’s to making 2026 the year you raise the bar and achieve the success you envision.

Lindsay Listanski

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National Vice President, Marketing
Coldwell Banker Realty



VISUALIZE	4
Outthink. Outcreate. Outperform. From Vision To Action	
ESTABLISH	8
Create A Strong Presence Promote Yourself Make An Impact	
NURTURE	14
Remain Top Of Mind Stay Connected	
WIN	20
Showcase Your Expertise	
DELIVER	24
Promote Your Properties Streamline Your Closings	
AMPLIFY	28
Cultivate Connections Fuel Your Growth	
MONTH-BY-MONTH ACTION PLAN	32
GLOSSARY	46

VISUALIZE

Clarify the kind of business you want to build and the impact you want to make, so every marketing move reflects your bigger vision.

OUTTHINK. OUTCREATE. OUTPERFORM.

YOUR 2026 VISION STARTS NOW

Make this year the one you push your limits – whether that means building your business, achieving financial freedom or leading your market. Coldwell Banker Realty provides the trusted name, winning marketing and the tools to help you achieve your goals. Track your progress with this workbook – your blueprint to success.

CLARIFY YOUR WHY

Great businesses are built on the clarity of their goals. Your why guides every decision, drives your discipline and inspires the people around you. Write it down – let it fuel your every move! Ask yourself:

- What does an exceptional life and business look like for me in 3, 5, and 10 years?

- What role will my business play in creating that life?

- How will I measure success, both in numbers and in impact?

New to the Business? → Start by building your personal brand (p. 10) and launching a custom website (p. 19).
Experienced Agent? → Update your presentations (p. 22) or spark engagement with an email campaign (p.18).

TOP PRIORITIES

What three things will move your business forward?

MY STRENGTHS

Which unique qualities or skills will I leverage to grow?

TOP 3 LEAD SOURCES

Where did my best business come from last year?

WHAT SUCCESS LOOKS LIKE IN 6 MONTHS

Define where you want to be by mid-year.

WHY THIS PLAN WORKS

Agents who fully leverage and integrate Coldwell Banker Realty tools and strategies generally see measurable results – such as an increase in leads, faster closings and higher sales volume. By prepping now, you can focus on what matters most – executing your strategy and closing deals.



FROM VISION TO ACTION

MARKETING BLUEPRINT

Ambition without execution is a wish. Break the year into quarters to stay focused and agile. Align your marketing investments with the results you want and adjust as you grow.

Q1

Marketing Goals

Budget

Target Audience

Q2

Marketing Goals

Budget

Target Audience

Q3

Marketing Goals

Budget

Target Audience

Q4

Marketing Goals

Budget

Target Audience

ESTABLISH

Build a solid foundation for your business – so clients can find you, trust you and remember you.

CREATE A STRONG PRESENCE

OWN THE SPOTLIGHT

Start the year with high-impact moves that establish credibility, attract attention and position you as the market authority:

- ☐ **Refresh your professional presence:** Update your headshot, bio, email signature and business cards.
- ☐ **Upgrade your brand:** Work with **Design Concierge** to create a premium, consistent look across all platforms.
- ☐ **Supercharge your website:** Add **Move Meter®** and **CB Estimate®** to spark client curiosity and engagement.
- ☐ **Perfect your property marketing plan:** Showcase listings with the same polish as top-tier brands.
- ☐ **Launch an email campaign:** Deliver relevant, valuable content to your sphere all year long.
- ☐ **Plan your social strategy:** Map out paid and organic campaigns that highlight your expertise and market insights.

GETTING STARTED ON SOCIAL MEDIA

If you aren't leveraging social media for your business, it's never too late!

- ☐ Do you know which social platforms your contacts are spending the most time on?
That's where you should start:

- ☐ Create a profile using the same headshot, bio and contact information that you use on websites.
- ☐ Download your chosen social media platform app(s) and make sure you've turned on Notifications in the Settings on your phone, so you will be alerted whenever someone interacts with you.

ONLINE INFLUENCE

Annually

- ☐ Update headshot and bio on social media accounts.
- ☐ Launch/update your personal YouTube channel, the second largest search engine in the world, to post home tours, market updates and other real estate video content.
- ☐ Additional ideas _____



Visit SocialMediaSignup.com
to receive weekly social media
content sent to your inbox.

PROMOTE YOURSELF

DESIGN CONCIERGE

Stand out with a personal brand that’s all you! **Design Concierge**, our in-house agency, offers semi-custom and custom marketing services. Choose from a la carte options or bundled services that include easy-to-follow plans. Browse samples and get started at [DesignConciergePortfolio.com](#).

Popular Services

- Agent logo, biography
- Business card, email signature, stationery
- **MoxiWebsites®**
- Personalized **MoxiPresent®** listing presentation
- Branded marketing templates for **Listing Concierge**
- Brochure, flyers, postcards, signage
- Advertising, social media headers
- And more!

Agents and teams who used Design Concierge were 3.5X more productive and closed 10 more deals, on average¹

START BRAINSTORMING YOUR BRAND

- How would you describe your style?

- What’s your signature color? Favorite font?

- What makes you unique among agents?

- What’s your area of specialty?



MAKE AN IMPACT

PRINT MARKETING

In today’s market, a printed piece to hold can still make a powerful impact. You can order a variety of printed pieces from **Xpressdocs®** to add to your marketing mix, and even include a QR code¹ on select materials to track their success. Many of the following also can be customized and professionally printed locally.

Depending on where you are in your journey, consider adding some of these elements to your marketing:

IDEAS FOR NEW AGENTS

- ☐ **Business cards**
- ☐ **Name badge**
- ☐ **Banner signage**
- ☐ Customized materials from **Design Concierge**
- ☐ **Pre-Listing Grab-and-Go Trifold Brochure²**
- ☐ **Buyer materials²**
(Buyer Grab-and-Go Trifold Brochure, flyers, checklists and postcards)

IDEAS FOR EXPERIENCED AGENTS

- ☐ **CB Estimate®** and **Move Meter®** materials
- ☐ **International Buyer’s Guide**
- ☐ **Postcards** – Just Listed/Just Sold, housiversary, seasonal, etc.
- ☐ **RealVitalize®** – postcards, flyers, door hangers
- ☐ **Prospecting** – postcards, door hangers
- ☐ Additional ideas:

★ **PRO TIP:** Refer to the *Action Plan calendar* on pp. 32-43 for additional ideas.

PREMIUM CANVA BENEFITS

We are partnering with **Canva** to bring you on-brand marketing materials faster and easier than ever before in 2026. New agents will be able to jump right in with professionally branded templates that make marketing feel effortless. While seasoned agents can take their existing Canva Pro content and elevate it with custom assets. Wherever you are in your business, this tool is designed to help you save time and show up with confidence in every listing, email and social post. *Check with your local marketing team for availability.*

- **Easy customization of branded templates:** Access templates for multiple asset types created in partnership with the Coldwell Banker® brand, with seamless access to logos, photos and data to simplify content creation.
- **Powerful design capabilities made easy:** Elevate your brand presence with polished, high-quality materials in minutes.
- **Smooth transition for existing Canva Pro users:** If you’re already using Canva, you can seamlessly migrate to Canva Enterprise without losing any content.

For details on the rollout timeline and training, visit **Desk** > search **Canva**.



NURTURE

Strengthen relationships with your sphere by showing up consistently and authentically – because trust is built over time, not overnight.

REMAIN TOP OF MIND

LEVERAGE YOUR SPHERE

Once you're on social media, send friend requests (Facebook), connect requests (LinkedIn) or follow (Instagram) the people you know. This might include:

- ☐ Current and past clients and prospects
- ☐ People you refer to your clients – appraisers, mortgage brokers, insurance agents, contractors, plumbers, landscapers, housekeeping services, lawyers
- ☐ Personal connections from your neighborhood, community organizations, volunteer groups, book clubs
- ☐ Friends from college, high school and places you've lived previously
- ☐ Coldwell Banker® employees
- ☐ Additional ideas _____

QUICK-START GUIDE

- ☐ Interact and respond when someone comments on your posts.
- ☐ Use **Microsoft Copilot** or your favorite AI tool to generate content ideas and attention-getting captions.
- ☐ Review your feed and watch for life events that might create a need for your services (wedding, birth, moving, etc.) – congratulate them first, then follow up by offering your support.
- ☐ Customize engaging videos to promote yourself and your listings.
- ☐ Reference and make use of the Action Plan calendar on pp. 32-43.
- ☐ Quarterly Reports: Keep your contacts in-the-know with market insights. (**Prospect Square > Market Reports**)
- ☐ Neighborhood News: Share local updates and stats your clients actually want. (**MoxiEngage > Neighborhood News**)





Monthly

- ☐ Customize social media assets for the month based on the Action Plan calendar (see pp. 32-43) so you're ready to post.
- ☐ Update Facebook header using images available on Canva.
- ☐ Post links to your Quarterly Reports or Area Reports in **Prospect Square** with comments about what's happening in the market.
- ☐ Pull ready-made social media assets from **Market Quest** showcasing where the Coldwell Banker® brand is #1 in your area.
- ☐ Additional ideas _____

Weekly

- ☐ Share posts from the Coldwell Banker **BLUE MATTER® blog** and the **Coldwell Banker Global Luxury® program blog**.
- ☐ Visit **SocialMediaSignup.com** to receive easy-to-share social media assets.
- ☐ Additional ideas _____

Listing Promotion

- ☐ Post unique features of your newest listing, and be sure to use other listing-focused materials.
- ☐ Additional ideas _____



Visit [SocialMediaSignup.com](https://www.socialmediasignup.com) to receive weekly social media content sent to your inbox.



Find best practices and other helpful tips in the *Social Media Guide for Agents*.



STAY CONNECTED

EMAIL CAMPAIGNS THAT CONVERT

Your database is gold. Stay in touch with smart, automated emails that build trust, warm up leads and get people clicking – while you focus on serving clients.

Seasonal Touches That Show You Care

Keep your name top of mind with these ready-to-go campaigns:

- **Holiday Campaigns:** Simple ways to stay connected through every season. (**MoxiWorks®** > **MoxiEngage > Campaigns**)
- **Topical Campaigns:** Choose high-interest themes like:
 - Home Improvement Tips
 - Home Security Tips
- **Quarterly Reports:** Keep your contacts in-the-know with market insights. (**Prospect Square > Market Reports**)
- **Neighborhood News:** Share local updates and stats your clients actually want. (**MoxiEngage > Neighborhood News**)



Need help marketing a new listing or building and maintaining your sphere? Book a virtual Next Available Strategy Consultation.

Monthly Messages That Keep You in the Mix

Use regular touchpoints to spark engagement and build momentum:

- Market Reports for On-the-Fence Leads
- Just Listed Campaigns
- Recently Sold Highlights
- **RealVitalize®** + Seller Prep Series
- Buyer Campaigns to Educate and Convert

★ **PRO TIP:** Automate the routine – personalize the moments that count.

LISTING PROMOTION THAT BUILDS YOUR BRAND

Every listing is a chance to build your brand. These campaigns help you stand out, showcase results and win more business:

- **Seller Campaigns:** Drip series on prep, staging and timing to convert interest into listings.
- **Buyer Campaigns:** Deliver helpful tips, checklists and tools to guide new buyers.

★ **PRO TIP:** Tailor your message based on who you're talking to – and where they are in their journey. Top agents don't just market listings. They market possibilities.



Watch on-demand videos on our Marketing Workshops YouTube channel (see p. 31 for more info).

MAXIMIZE YOUR MARKET PRESENCE

Showcase your business with professional, striking marketing pieces that feature elegant design. Take advantage of the powerful Coldwell Banker® market presence – including top-rated national advertising like our **Move Meter®** football spots and the “Live well with ColdwellSM” campaign – and tap into a full library of related imagery, video and ad graphics.

Explore all the options available to help you promote yourself and your business. We make it easy to customize your marketing materials across every platform: social media, your website, email communications and video.

- Browse **Xpressdocs®** for a vast selection of print materials and editable, fully customizable flyers, postcards and social graphic templates.
- Build a unique “About Me” page using **MoxiWebsites®** to highlight your value proposition, client testimonials and recent sales.
- **Custom Video®** offers a template that can be customized with your own contact info, music and messaging.

Leverage a variety of materials that are additionally available in Spanish-language versions – including **MoxiPresent®** presentations, brochures and postcards for sellers and buyers, property marketing assets, MoxiWebsites templates and more.



WIN

Identify the opportunities that align with your strengths and position yourself to win more listings, referrals and repeat business.

SHOWCASE YOUR EXPERTISE

THE PERFECT PITCH

Develop your unique value statement with Credibility, Relevance and Differentiation. Craft it using **Microsoft Copilot** for assistance.

Then take your unique value proposition pitch to the top of your game. Recognize how to integrate your individual talents and strengths with the power of the Coldwell Banker® brand. Rehearse your pitch in various formats. Each one is tailored for a specific situation and aims to make every potential-client interaction memorable:

Your 30-Second Script

Designed to help you seize quick-sell opportunities in everyday life.

Your 3-Minute Script

This “cocktail party pitch” is your answer to the common “what do you do?” question at events.

Your 30-Minute Script

The comprehensive pitch puts it all together, clearly communicating the value you bring to the transaction and ensuring clients understand the benefits of choosing you as their agent. It includes your 3-minute script, the 12-Minute Listing Presentation and time for client discussion.

Visit **Desk > My Business** for helpful **Perfect Pitch** resources, including a **Self-Paced Agent Workshop video**.



MASTERFUL PRESENTATIONS

When the moment comes to buy or sell, prospects will remember the trusted guide who made them feel informed, empowered and confident. Make that impression by creating presentations that wow with **MoxiPresent®**, our digital presentation and CMA tool.

- ☐ Choose from a suite of professionally designed buyer, seller and luxury presentations (available in English and Spanish) in **MoxiPresent**, which you can customize and update on the fly with live MLS data, video testimonials, charts and more.
- ☐ Highlight the power of **Listing Concierge** using the seller presentation in **MoxiPresent**, which can help you win the listing when sellers see your incredible property marketing program.
- ☐ Feel prepared and polished. Step-by-step scripts and other resources help you navigate client presentations smoothly, boost your confidence and gain a competitive edge. Find them at **Desk > Marketing > Prospecting**.
- ☐ Mention the Seller’s Assurance Program, featured in the listing presentation in **MoxiPresent**, to show how you can use programs like **RealVitalize®** to help sell their home³.
- ☐ Create your own presentations for open houses and neighborhood tours and report market data that is updated in real time. Show clients what their commute will look like using **MoxiPresent’s** integration with INRIX Traffic. Then share your presentation via email, in print and on social media.
- ☐ Personalize your presentations by ordering semi-custom agent profile and testimonial pages through **Design Concierge**.
- ☐ Additional ideas: _____

Affiliated agents who used MoxiPresent earned \$34.5K more and were 1.5X more productive²



Visit **NextAvailableAppointment.com** to schedule a Product Support appointment on MoxiPresent.

BUILD TRUST WITH BUYERS

Equip yourself with powerful tools to showcase your value as a buyer’s agent. A full suite of assets is outlined on the buyer bundle flyer available at **Desk > Marketing > Prospecting**.

Reference it for information about brochures, emails, social graphics, **MoxiPresent** pages and more – specifically designed to help you simplify the home-buying process and clarify compensation conversations with clients.



BRILLIANT

Create a client experience that exceeds expectations and turns every transaction into a lasting impression and future opportunity.

PROMOTE YOUR PROPERTIES

LISTING CONCIERGE

Bring your listings to life in just minutes with our **Listing Concierge** program. Choose from four package levels, each supported by a team of experienced, dedicated coordinators who are ready to help every step of the way.

Built with a digital-first approach, these packages are designed to help you stand out in today's fast-moving media landscape. You'll have the flexibility to customize your selections to match your unique marketing goals – and you can enhance any package with powerful add-ons like extra photography options, Boost ad extensions, targeted YouTube views and more.

Listing Concierge goes beyond property promotion – it's a strategic tool that should be integrated into your marketing plan to help you secure listings and attract new leads. **It's your key to turning one listing into three!**

Digital-First Features²

- Professional photography
- AI-powered property description
- 30-second YouTube ad with views
- Single-property website
- Geographically targeted marketing via Boost
- "Just Listed" and "Just Sold" eBlast to your contacts
- Listing featured in The Update email to all active MLS members
- Social media assets
- Photo slideshow
- Downloadable flyers with trackable QR code

More Resources

- Want to create your own templated property marketing? Visit **Desk > MoxiWorks® > Impress**
- Show sellers your plan with the 12-Minute Listing Presentation at **Desk > MoxiWorks > Present**



Watch the 12-Minute Listing Presentation Tutorial

Agents who used Listing Concierge earned \$113K more and closed 9 more deals, on average⁴

BOOST

With Boost you can automate your digital advertising campaigns so promotion of you and your listings can be created in just minutes.

Visit **Desk > Boost** to create a campaign that will run on Facebook, Instagram, Nextdoor and over 1,000 websites.

Affiliated agents who used Boost earned \$80K more and were 2.3X more productive⁵



STREAMLINE YOUR CLOSINGS

TRANSACTION CONCIERGE

Transform your client's experience with end-to-end support from contract to close, at no cost to you. Backed by our tech tools and in-house **Client Experience Specialists**, this program helps keep each deal on track and your clients informed — so you can focus on growing your business.

How to Use It in Your Business:

- Add **Transaction Concierge** to your listing and buyer presentations as a core service offering.
- Mention it in your marketing materials to position yourself as a full-service, stress-free choice for clients.
- Promote it on your social media channels to highlight the Coldwell Banker® difference.
- Promote Transaction Concierge on your agent website — available in **MoxiWebsites**.



Visit Desk to find materials and client scripts to promote Transaction Concierge materials.

AMPLIFY

Leverage tools, platforms and partnerships to expand your reach, elevate your brand and set yourself apart from the competition.

CULTIVATE CONNECTIONS

GET OUT THERE

- ☐ Both virtual and face-to-face meetings are effective ways to convert a prospect into a client. Be sure your plan includes opportunities to make that happen.
- ☐ Attend at least one networking event each month, proudly wearing your name tag or a Coldwell Banker® logo shirt.
- ☐ Experience **Gen Blue**® to benefit from this one-of-a-kind opportunity to learn from incredible speakers and connect with your fellow affiliated agents.
- ☐ Get involved with local charities or organizations that support causes you believe in. It's a rewarding way to establish strong connections while making a difference in your community.

GENERATE A PASSIVE REVENUE STREAM

Referral Rewards is a powerful **Wealth Builder** program that helps you generate a passive commission stream by introducing other productive agents to the Coldwell Banker brand. You share in the success of the agents you recruit, receiving a Referral Rewards Commission Payment equivalent to 1% of their adjusted gross commission income (AGCI) on closed transactions⁶ – as long as both agents remain affiliated with Coldwell Banker. Visit **Desk > My Business > Referral Rewards** to learn more.

GROW YOUR BUSINESS

Agents participating in the **CB Supports St. Jude** program make an automatic donation for every home sale or purchase they complete. Your participation in the CB Supports St. Jude program not only increases awareness of this important cause, but also allows you to associate yourself with a world-renowned organization to help attract new sellers and buyers who are connected to St. Jude.

ATTEND REGIONAL EVENTS

Check with your marketing team for information about upcoming local happenings and list them here.



FUEL YOUR GROWTH

KEEP LEARNING

Ongoing education is vital for real estate agents, so you can stay on top of trends and tools and sharpen your skills. A robust educational program, including online, on-demand and instructor-led live classes, is available to you at **Coldwell Banker University® (CBU®)**.

The **Marketing Workshops YouTube channel** is your one-stop shop to access demonstrations, quick tech tips and videos produced by your field marketing team. Visit **CBRMarketingWorkshops.com** to sign up for courses specifically designed to boost your proficiency in our marketing resources.

A sampling of topics for new agents:

- Shine Online With Design Concierge
- Branding Your Client Presentations
- Your Facebook Business Page

Other dynamic workshops include:

- Social Media Mastermind
- YouTube Video Listing Ads
- Pack the House: Strategies to Bring Buyers
- Creating and Promoting Your Single-Property Websites

POLISH YOUR SKILLS

Your sales skills and marketing can help you get your foot in the door – then you need to be prepared to talk your way to closing the deal. Visit **CBU.com** for a schedule of **AMP!** courses, which is designed to help you get business now and includes lead generation best practices, developing scripts and practice calls. Benefit from our **Buyer Strategies** courses, with in-class and self-paced activities, live demos and skill-building activities that can help you hone the essential tools for success. For qualified agents, unlock the power of the Coldwell Banker Global Luxury® program by becoming a certified **Global Luxury Property Specialist**. Visit **Desk > search CBGL certification** to learn more.

BOOST YOUR BUSINESS

In 2024 our instructors earned a Net Promoter Score (NPS) of 96⁷ – which is impressive knowing that a score of 80 or above is considered world-class! Also noteworthy: The majority of learners (94%) said they're confident in the subject material after completing a course⁸.

Review the course catalogs and Agent Pathways available at **CBU.com** for deep dives into business planning, lead generation, price repositioning, product training and much more.

THE MARKETING CATALOG

Whether you're new to real estate or looking to grow your business, **The Marketing Catalog** provides a comprehensive array of live and on-demand marketing workshops covering essential skills and advanced strategies, along with social media content, live support from our Marketing Specialist team and more.

Consider it your go-to resource for marketing education. The latest edition features expanded content on **Custom Video®** and the **RealVitalize®** program, newly added on-demand workshops, and an enhanced Coldwell Banker Global Luxury® program chapter with fresh workshop offerings, quick tips and direct links to essential resources. Dive in and discover new ways to elevate your marketing game.



*Explore The Marketing Catalog:
A self-serve guide to Coldwell
Banker® marketing tools, training
and content.*

MONTH-BY-MONTH ACTION PLAN

JAN

Future Focused

1. Email: Get Your Home Market-Ready

2. Offer a Tax Prep Packet

3. Social: Winter Home Maintenance Checklist

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1 ☐ Social/Email: Happy New Year ☐ Email: Neighborhood News	2	3
4 ☐ Social: Home Buying and Selling Lead Generation	5	6	7	8 ☐ Social/Postcard: RealVitalize®¹	9	10
11 ☐ Social: St. Jude²	12	13 ☐ Social/Email: Make Your Dreams Come True Day	14 ☐ Social/Email: Organize Your Home Day	15	16	17
18 ☐ Social/Email/Postcard: RealVitalize®¹ ☐ Email: Seller – RealVitalize Services, Cleaning Active Buyer – Determine the Right Neighborhood	19 ☐ Social/Email: Martin Luther King Jr. Day	20	21	22	23	24
25	26 ☐ Social: 5 Essentials of a Buyer's Agent	27	28	29 ☐ Postcard: Lunar New Year (Feb. 6)	30	31 ☐ Social: CB Refer

FEB

Spring Market Prep

1. Refresh Your Buyer Presentation

2. Social: Home Buyer Myths Debunked

3. Host a Client Appreciation Event

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1 ☐ Postcard: Valentine's Day (Feb. 14) ☐ Social/Email: Black History Month ☐ Email: Neighborhood News	2 ☐ Social/Email: Groundhog Day	3	4	5 ☐ Social/Email: Energy Saving Tips	6	7 ☐ Social/Email: FSBO
8	9	10	11 ☐ Social/Email/Postcard: RealVitalize®*	12	13	14 ☐ Social/Email: Valentine's Day
15	16 ☐ Social/Email: Presidents' Day	17 ☐ Social: Ramadan	18	19	20 ☐ Social/Email: Love Your Pet Day	21
22	23	24	25 ☐ Social: Home Buying and Selling Lead Generation	26	27 ☐ Postcard: Tax Tips	28

STAY TOP OF MIND: A new lead comes in from your sphere, but they’re not quite ready to buy. Use the suggested outreach topics to keep in touch regularly until they’re ready to make a move.

I HAVE SUCCESSFULLY...

- ☐ Identified my top three business goals for 2026.
- ☐ Mapped out my Q1 marketing goals and budget.
- ☐ Identified my top three lead sources.

1. RealVitalize is available in select markets only. 2. Only for agents who participate in CB Supports St. Jude program.

*RealVitalize is available in select markets only.

MAR

Lucky Listings

1. Polish Your Listing Presentation

2. Social: Spring Market Preview

3. Email: Home Renovation ROI Tips

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1 ☐ Social/Email: Women's History Month ☐ Postcard: St. Patrick's Day ☐ Email: Neighborhood News	2	3	4 ☐ Social: Now Might Be the Right Time to Sell	5	6 ☐ Social/Email/Postcard: RealVitalize®*	7
8 ☐ Social: International Women's Day ☐ Email: Daylight Savings Time (March 8)	9	10	11 ☐ Social: Quotables & Stats 2025	12	13 ☐ Social: Home Buying and Selling Lead Generation ☐ Email: Selling Your Home ☐ Postcard: Baseball Schedules	14
15	16	17 ☐ Social/Email: St. Patrick's Day	18	19	20 ☐ Social/Email: First Day of Spring ☐ Social/Email: Eid al-Fitr	21 ☐ Social: Quotables & Stats 2025
22	23	24	25 ☐ Social: Home Buying and Selling	26	27	28 ☐ Social: Quotables & Stats 2025
29	30	31				

GET THE WORD OUT: It's March and you have no events or open houses scheduled just yet. Choose at least three prospecting ideas from this page to make a splash this month.

*RealVitalize is available in select markets only.

APR

Fresh Opportunities

1. Social: Spring Listing Feature

2. Craft a Winning Follow-Up Strategy

3. Build a Vendor Network

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1 ☐ Social/Email: Fair Housing Month ☐ Social/Email: Arab American Heritage Month	2 ☐ Email: Neighborhood News	3	4
5 ☐ Social: Quotables & Stats 2025 ☐ Social: Easter	6	7	8 ☐ Social: Quotables & Stats 2025	9	10 ☐ Postcard: Earth Day (April 22)	11
12	13	14	15	16	17 ☐ Social/Email/Postcard: RealVitalize®*	18
19	20	21	22 ☐ Social/Email: Administrative Professionals Day	23	24	25
26	27	28	29 ☐ Postcard: Mother's Day (May 10) ☐ Social: Home Buying and Selling Lead Generation	30 ☐ Email: Home Improvement Tips – Outdoor Appeal		

IN THE SPOTLIGHT: You have three minutes to introduce yourself at an event – draft your value pitch using the Perfect Pitch formula (see p. 21).

*RealVitalize is available in select markets only.

MAY

Bloom Where You're Planted

1. Sponsor a Local Cause

2. Email: Pre-Closing Checklist

3. Social: Professional Milestone Recognition

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1 ☐ Social/Email: New Homeowners Day ☐ Social/Email: Asian-Pacific American Heritage Month ☐ Social/Email: Jewish American Heritage Month	2 ☐ Social/Email: Military Appreciation Month
3	4	5 ☐ Social/Email: Cinco de Mayo	6 ☐ Email: Neighborhood News	7	8	9
10 ☐ Social/Email: Mother's Day	11	12 ☐ Postcard: Memorial Day (May 25)	13 ☐ Postcard: Eid al-Adha (May 26)	14	15 ☐ Social: Home Buying and Selling Lead Generation	16
17	18	19 ☐ Social/Email/Postcard: RealVitalize®*	20	21 ☐ Email: Home Improvement Tips – Boost Value	22	23
24	25 ☐ Social/Email: Memorial Day	26 ☐ Social/Email: Eid al-Adha	27	28	29	30
31						

JUN

Summer Strategizing

1. Social: "Why I Love My Neighborhood" Client Stories

2. Email: Local Farmers Market Guide

3. Offer a "What's Your Home Worth?" Free Valuation

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1 ☐ Social/Email: National Homeownership Month ☐ Social/Email: Pride Month ☐ Email: Neighborhood News	2	3	4	5 ☐ Postcard: First Day of Summer (June 21)	6
7	8	9	10 ☐ Postcard: Father's Day (June 21)	11	12	13
14 ☐ Social/Email: Army Birthday ☐ Social/Email: Flag Day	15	16	17	18	19 ☐ Social/Email: Juneteenth ☐ Postcard: Independence Day	20
21 ☐ Social/Email: Father's Day ☐ Social/Email: First Day of Summer	22	23 ☐ Social/Email: Pride Month	24	25	26 ☐ Social: Home Buying and Selling Lead Generation	27
28	29	30				

WE'RE ALMOST HALFWAY THROUGH THE YEAR! SO FAR I'VE SUCCESSFULLY...

- ☐ Updated my branding, marketing materials and online profiles.

☐ Selected the tools and templates I'll use during the coming months.
- ☐ Outlined my next 60 days of prospecting activities.

☐ Firmed up my Q3 marketing goals and budget.

PROMOTE VALUABLE TOOLS: Transaction Concierge is an end-to-end transaction support service for your clients – highlight this exclusive tool on social media and your personal website (see p. 27 for details).

*RealVitalize is available in select markets only.

JUL

Hot Market

1. Email: First-Time Buyer Tips

2. Social: Client Testimonial Spotlight

3. Host an Open House Event

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1 ☐ Email: Neighborhood News	2	3	4 ☐ Social/Email: Independence Day
5	6	7	8	9	10	11 ☐ Social/Postcard: RealVitalize®*
12	13 ☐ Social/Email/Postcard: Key to Your Castle	14	15	16	17	18
19	20	21 ☐ Postcard: Back to School Schedule	22 ☐ Email: Energy Saving Tips	23	24	25
26	27	28	29 ☐ Email: Home Improvement Tips – Home Decor	30	31	

KNOW YOUR COMMUNITY: You just listed a home in a competitive neighborhood. Reach neighbors effectively with valuable info about local events and destinations.

*RealVitalize is available in select markets only.

AUG

Back to Business

1. Social: Summer Memories Photo Share

2. Perfect Your Pitch

3. Update Your CRM Strategy

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1 ☐ Email: Neighborhood News
2	3	4 ☐ Social/Email: Coast Guard Birthday	5	6	7 Football Schedules	8
9	10	11	12 ☐ Social: Home Buying and Selling Lead Generation	13	14	15 ☐ Social/Email/Postcard: Key to Your Castle
16	17	18	19 ☐ Postcard: St. Jude ¹	20	21 ☐ Email: Home Improvement Tips – Curb Appeal	22
23	24	25	26	27 ☐ Social/Email: Happy Birthday Coldwell Banker®	28	29 ☐ Social/Email/Postcard: RealVitalize® ²
30	31 ☐ Email: Move Meter® Match Up					

BE THEIR GO-TO INFO SOURCE: Choose a recent Quarterly Report or Area Report from Prospect Square and write a short post to pair with it on social media.

1. Only for agents who participate in CB Supports St. Jude program. 2. RealVitalize is available in select markets only.

SEP

Fall Momentum

1. Host a Local "Market Trends" Workshop

2. Email: Home Insurance Checkup

3. Social: "New Community" Feature

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1 Email: Neighborhood News Postcard: Basketball/Hockey Schedules	2 Postcard: Rosh Hashanah (Sept. 12)	3	4	5
6 Postcard: First Day of Fall (Sept. 22)	7 Social/Email: Labor Day	8	9	10	11 Social/Email: Patriots Day	12 Social/Email: Rosh Hashanah
13 Social/Email/Postcard: Key to Your Castle Social/Email: Grandparents' Day	14	15 Social/Email: Hispanic Heritage Month	16	17	18 Social/Email: Air Force Birthday	19
20 Social: Move Meter® Match Up	21 Social/Email: Yom Kippur	22 Social/Email: First Day of Fall	23	24	25	26
27	28	29	30 Social/Email/Postcard: RealVitalize®*			

MEET THEM LOCALLY: A popular seasonal festival is approaching that draws hundreds of potential buyers and sellers. Use your social media platforms to promote your presence at the event.

OCT

Power Plays

1. Email: Market Update – Q3 Recap

2. Social: "New Home Before the Holidays"

3. Track DOM Compared to Market Average

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				☐ Social/Email: National Disability Employment Awareness Month ☐ Email: Neighborhood News 1	2	3
4	5	6	☐ Social: Home Buying and Selling Lead Generation 7	8	9	10
11	12	☐ Social/Email: Navy Birthday 13	14	15	☐ Social/Email: Boss's Day ☐ Postcard: Halloween (Oct. 31) 16	17
☐ Postcard: Daylight Savings 18	19	20	21	☐ Social/Email/ Postcard: Key to Your Castle 22	23	24
25	26	27	☐ Postcard: Veterans Day (Nov. 11) 28	29	30	☐ Social/Email: Halloween 31

SHOW THEM AROUND: Post an engaging video on social media of a property tour to hype an upcoming open house. Promote the fall-themed treats that will be available at the event.

*RealVitalize is available in select markets only.

NOV

Gratitude and Growth

1. Marketing Refresh
With **Design Concierge**

2. Drop Off Seasonal
Treat Bags to Clients

3. Review Customer
Satisfaction

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1 ☐ Social/Email: Native American Heritage Month ☐ Social/Email: Dia de los Muertos ☐ Email: Neighborhood News	2	3	4 ☐ Social: Now Might Be the Right Time to Sell	5 ☐ Social: Home Buying and Selling Lead Generation	6	7 ☐ Social/Email/ Postcard: Key to Your Castle
8 ☐ Social/Email: Diwali	9	10 ☐ Social/Email/ Postcard: RealVitalize®	11 ☐ Social/Email: Veterans Day	12	13 ☐ Postcard: Thanksgiving (Nov. 26)	14
15 ☐ Postcard: Small Business Saturday (Nov. 28)	16	17	18	19 ☐ Postcard: Hanukkah (Dec. 5)	20	21
22 ☐ Postcard: Happy Holidays	23	24	25	26 ☐ Social/Email: Thanksgiving	27	28
29	30					

DEC

Finish Strong

1. Online Presence
Audit

2. Establish Goals for
Next Year

3. Social: Happy
Holidays Video
Message

Further Outreach

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1 ☐ Social/Email: Happy Holidays ☐ Email: Neighborhood News	2	3 ☐ Social/Email: International Day of Persons with Disabilities	4	5 ☐ Social/Email: Hanukkah
6 ☐ Postcard: First Day of Winter (Dec. 21)	7	8	9	10	11 ☐ Postcard: Christmas (Dec. 25), Kwanzaa (Dec. 26)	12
13 ☐ Social/Email: National Guard Birthday	14	15	16 ☐ Social: Home Buying and Selling Lead Generation	17	18 ☐ Postcard: Welcome 2027	19
20 ☐ Social/Email: United States Space Force Birthday	21 ☐ Social/Email: First Day of Winter	22	23	24	25 ☐ Social/Email: Christmas	26 ☐ Social/Email: Kwanzaa
27	28	29	30	31 ☐ Social/Email: New Year's Eve		

PUT YOURSELF OUT THERE: Scan the prospecting calendar for any missed opportunities to position yourself as a market expert and to drive engagement.

THIS YEAR I SUCCESSFULLY...

- ☐ Attended networking events to make valuable new connections.
- ☐ Got involved with local charities and supported causes I believe in.
- ☐ Registered for at least two courses to help boost my production power at CBRMarketingWorkshops.com.
- ☐ Determined areas of focus and opportunity for the coming year.

*RealVitalize is available in select markets only.

MY 2026 YEAR-END MARKETING SUMMARY

Reflect on your progress and set your sights on what’s next to achieve even more growth!

GOALS I MET (AND CELEBRATED!)

Your wins – big or small – that made this year count.

MONTHLY OUTREACH CADENCE

How often you connected with your sphere and in what ways.

WHAT’S WORKING

The tools and strategies that moved your business forward.

CONTENT THAT RESONATED

The topics and types of content that got the most engagement.

QUESTIONS FOR MY MARKETING TEAM

Which resources, tools or guidance would provide more value?

NOTES

Questions?



Visit NextAvailableAppointment.com to schedule one-on-one marketing support.

GLOSSARY

Boost – Automates real estate digital advertising campaigns for listings, open houses and more on Facebook, Instagram, Wave and across the web. **(Page 25)**

CBRMarketingWorkshops.com – Platform for field marketing-run workshops designed to boost your marketing skills and proficiency of Coldwell Banker Realty marketing resources. All workshops are held virtually via Microsoft Teams. **(Page 31)**

Coldwell Banker University® – Find robust education programs for all levels of experience built on best practices from top performers within the Coldwell Banker® network, including instructor-led and self-study courses designed to help you grow your business. **(Page 31)**

Design Concierge – Build on the powerful Coldwell Banker brand name by creating your own complementary personal brand, including a logo, bio, personal brochure, email signature, MoxiPresent® listing presentation, MoxiWebsites® and more. **(Page 10)**

Listing Concierge – Win the listing, prove your value and turn one listing into three with creative and consistent, digital-first property marketing handled on your behalf. **(Page 25)**

The Marketing Catalog – Your ultimate guide to Coldwell Banker Realty’s powerful resources and support. Use it to explore workshops, digital tools, property marketing, tech tips and more – all in one place. It’s everything you need to take your business to the next level. **(Page 31)**

Market Quest – Access graphs that display MLS-based statistical data and reports on #1 market share claims, market position and market trends that are automatically generated based on user-applied filters, all pre-populated with your contact info. **(Page 16)**

MoxiEngage® – This CRM tool is designed to fit your unique selling needs by leveraging property data, encouraging long-term lead nurturing, driving repeat and referral business and keeping you on track to reach your goals. **(Page 18)**

MoxiPresent – This listing presentation and comparative market analysis (CMA) tool helps you create sleek, professional presentations integrated with your MLS to provide accurate and up-to-date market data. **(Pages 10, 19, 22)**

MoxiWebsites – An easy-to-use website builder that makes putting your best foot forward a simple task. Grow your brand, sphere and business with custom, branded websites. **(Pages 10, 19)**

Next Available Appointment – On-demand support offering 20-minute, solution-oriented sessions to assist with core products and 40-minute, strategy-focused sessions for elevating marketing efforts. **(Pages 18, 22, 45)**

Prospect Square – Brings together all your contacts and all the ways you reach them into one central hub. Stay connected with clients and contacts by sending newsletters, property eBlast template and Market, Area and Quarterly Reports to showcase your expertise. **(Pages 15, 16, 18)**

RealVitalize® – Helps your sellers make inspiring home improvements with no money up front, including kitchen renovations, painting, staging, replacing flooring, enhancing curb appeal and more. **(Pages 12, 18, 22, 31)**

Referral Rewards – Referral Rewards is a powerful program that helps Coldwell Banker affiliated agents generate a passive commission stream by introducing other successful agents to a career with the brand. **(Page 29)**

Xpressdocs® – Order printed marketing materials, business cards, direct mail, property brochures and more. **(Page 12)**

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GENERAL GUIDELINES AND REMINDERS

Each affiliated sales representative and broker is responsible for complying with any consumer disclosure laws or regulations.

Wire Fraud - Wire fraud scams continue to affect the real estate industry. Given the ongoing risks of wire fraud previously shared by the Federal Trade Commission and the National Association of REALTORS®, it is imperative that brokers and agents continue to be vigilant to this very real threat.

Advertising Guidelines - Claims in advertisements should be truthful, should not be deceptive or unfair, and should be fact-based.

Website Considerations - If you have a website, you may consider Privacy Policies about how you intend to use any data you might collect over the Internet, and incorporating terms of use.

Copyright and Trademark Issues - Be mindful of using materials including but not limited to photos, videos, and music that may be copyrighted or trademarked. You must obtain permission to use any copyrighted or trademarked materials before using them.

General Guidance - The information herein is intended for informational purposes only and is not intended, nor shall it be deemed, to provide or offer legal or financial advice or guidance. We recommend you consult with your own advisor when dealing with any of the issues visited herein.

Do Not Call Registry - The FTC’s Telemarketing Sales Rule helps protect US-based consumers from fraudulent telemarketing calls and gives them certain protections under the National Do Not Call Registry. Companies also need to be familiar with rules banning most forms of robocalling. If you or someone working on your behalf is telemarketing, know the dos and don’ts before you plan your strategy, including but not limited to the following:

1. Before making a sales call, you or a third-party vendor you hire should determine whether the consumer’s phone number has been included on the National Do Not Call Registry and your company-specific Do Not Contact list. We recommend that you speak to your broker about compliance with these rules.
2. Any sales calls or communications to consumers must follow the requirements of the Telephone Consumer Protection Act (“TCPA”), state and local telemarketing laws, including but not limited to requirements that messages or calls may not be sent using an automatic telephone dialing system or an artificial or prerecorded voice unless you have express written consent from the consumer.

We recommend that you review your local MLS rules and regulations regarding the proper use of listing data for other commercial purposes such as soliciting new clients, contacting expired listings, or recruiting.

Similar laws may apply outside of the United States, including, but not limited to the CAN-SPAM Act, by way of example.

Avoid Fines from Violating the Telephone Consumer Protection Act (TCPA)

Why the TCPA matters to you:



You will be **personally liable** for any violations of the TCPA.



Fines can be as much as **\$500 per call or text**, and add up quickly.

Before making your next call or text:



DO NOT use an **automated platform vendor** to call or text potential customers.

DO NOT leave pre-recorded messages.



Check phone numbers against Do Not Call Lists prior to making any calls or texting.



Get prior written consent before calling or texting a number on the **Do Not Call Lists**.

TCPA Myths Dispelled

Myth 1:

"The TCPA applies to calls, not texts."

NOT TRUE. *The TCPA covers both calls and texts.*

Myth 2:

"I checked the Do Not Call (DNC) Lists when I got the number; I'm covered."

NOT TRUE. *Numbers are added to the DNC Lists all the time. If you haven't recently checked the number against the DNC Lists, you must do so before calling or texting.*

Myth 3:

"A friend gave me this person's number, so I don't need to check the DNC Lists."

NOT TRUE. *If the person you are going to call or text did not give you the number, you must check the DNC Lists.*



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NOTE: If you choose to make contact by phone or text (i) check phone numbers against the federal DNC registry, any state DNC list and your company DNC list (ii) do NOT use autodialers and (iii) do NOT use artificial voice or pre-recorded messages. Emails must follow CAN-SPAM rules. You should also check to make sure you follow the Do Not Email/Unsubscribe Requests.

1. Based on average commission earned and average units closed of active agents and teams with production between Jan 1st, 2024 and Dec 31st, 2024 that placed an order within Design Concierge since the program's inception. Results are not guaranteed. 2. Based on average commission earned and average units closed of Coldwell Banker Realty active agents with production that performed an action in MoxiPresent® between Jan 1st, 2024 and Dec 31st, 2024. Results are not guaranteed. 3. RealVitalize is available in select markets only. 4. Based on Coldwell Banker Realty Listing Concierge usage data from Jan 1st, 2024 through Dec 31st, 2024 with an average sales price of properties marketed through Listing Concierge of \$710,014. Results are not guaranteed. 5. Based on average commission earned and average units closed of active agents with production that performed an action in Boost between Jan 1st, 2024 and Dec 31st, 2024. Results are not guaranteed. 6. To be eligible for this program, the agent you refer cannot have been affiliated with the Coldwell Banker brand or any other Anywhere Real Estate brand within the past six months or qualify for other recruitment incentive programs offered by Coldwell Banker. Other restrictions apply. See Program Terms for specifics. Participation in the Program does not guarantee continued association with Coldwell Banker Real Estate or Coldwell Banker Commercial, and Referral Rewards Payments under this Program shall cease upon Sponsoring Agent or Recruited Agent's disassociation for any reason. 7. Based on survey results from attendees of Productivity Courses offered in 2024, sourced by Medallia. 8. Based on survey results from approximately 6,000 attendees of Productivity Courses offered in 2024. MoxiWorks® and its related marks and logos are owned by MoxiWorks, LLC and used with permission. Any services or products provided by MoxiWorks, LLC are not provided by, affiliated with, or related to Coldwell Banker Real Estate LLC, or its affiliated companies. Company materials, programs or meetings that are not for compliance purposes are optional for your use as an independent agent affiliated with the Company. Your use is not required for your continued affiliation with the Company. This document contains suggestions and best practices that you may use at your discretion. ©2025 Coldwell Banker. All Rights Reserved. Coldwell Banker and the Coldwell Banker logo are trademarks of Coldwell Banker Real Estate LLC. The Coldwell Banker® System is comprised of company owned offices which are owned by a subsidiary of Anywhere Advisors LLC and franchised offices which are independently owned and operated. The Coldwell Banker System fully supports the principles of the Fair Housing Act and the Equal Opportunity Act. 259RYR_CBR_9/25