

# REALTOR® Etiquette and Professional Courtesies



Real Estate is a reputation business. Practicing sound business etiquette and consistent professional courtesies will enhance your reputation both inside and outside the real estate arena.



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REALTORS® are bound by the National Association of REALTORS® Code of Ethics; complying with the Code is a core requirement of being a REALTOR®. Beyond ethics, business etiquette and professional courtesies are critical to maintaining an environment of respect for all those involved in a real estate transaction—both clients and fellow REALTORS®. These guidelines, compiled by the Austin Board of REALTORS®, are voluntary and are not a part of the mandatory Code of Ethics. The practices are simple; many are common sense, and following them is an excellent way to build a reputation for professional conduct that will enhance your standing and elevate the public perception of the real estate profession. Each principle is intended to cultivate in you the “REALTOR® savoir-faire,” the polished assuredness of a true professional.

## Respect for the Public and Fellow REALTORS®

- Always follow the “Golden Rule:” treat others as you would like them to treat you.
- Be on time for all appointments and meetings.
- Respond promptly to inquiries and requests for information.
- Schedule appointments and showings as far in advance as possible.
- If a prospective buyer decides not to view an occupied home, promptly notify the seller or occupant by phone.
- Communicate with all parties in a timely fashion.
- Present a professional appearance at all times: dress appropriately and drive a clean car.
- When leaving a voice mail, clearly state your name, repeat your phone number twice, and briefly state the nature of your business.
- Be aware of and respect cultural differences.
- Be aware of and meet all deadlines.
- Promise only what you can deliver and keep your promises.
- Do not tell people what you think; tell them what you know.
- Build mutual respect through honest and courteous communication.

## Prepare for Showings

- Read all viewing instructions and agent’s remarks before going to the property.
- Correct driving directions are critical; drive the most direct route to a listing before posting it in the MLS.
- When inquiring about a property or when talking with another REALTOR® or seller, identify yourself and your company.
- If multiple phone numbers for an occupant are posted in the MLS, leave a voice message with each number if you do not speak with an occupant.
- If appointments are made several days in advance, confirm by phone on the day before showing.
- Listing agents should provide multiple phone numbers on their MLS postings to increase the probability of a quick response should a showing agent need additional information.
- Coach sellers to become scarce during a showing or simply leave the property.
- Post a note on an interior door giving location of a pet within the room, i.e., “in kennel.”
- Prominently post a note with the pet’s name and any instructions if the pet will be in the house or yard during showing.
- Access and alarm codes may be posted in an attachment in MLXchange; they are posted for the benefit of the showing agent.
- When requesting property information from the listing agent via e-mail or telephone, include the property address and/or MLS number.
- Combo codes and/or gate codes should not be divulged or shared with potential buyers.

## Showing the Property

- Leave your business card when showing a property.
- Use the sidewalks; if weather is inclement, remove shoes inside the property.
- Never allow buyers to enter a property unaccompanied.
- When showing an occupied home, always ring the doorbell or knock and announce yourself loudly before entering. Knock and announce yourself loudly before opening any closed interior door.
- If occupants are home during showings, ask permission before using the restroom.
- Honor the listing agent’s relationship with the seller and encourage the seller to direct all questions to his or her agent.
- When the occupant is absent, leave the property as you found it (turn on/off lights, fans, air conditioning and heat; open/close drapes and blinds).
- Do not allow anyone to eat, drink, smoke, dispose of trash, or bring pets into the property.
- Do not remove the last Sellers’ Disclosure form from the property.
- Refrain from making sarcastic or negative comments about the property or neighborhood.
- If the sellers are on the property, inform them when you are leaving.
- If you notice any irregularities in a property when showing, report them to the listing agent; also report any error or incorrect information you notice on the MLS posting.
- Double check all exterior doors to ensure locks are engaged before leaving property.
- Respect your client by limiting your use of cell phones and computers to the business at hand.

## Presenting the Offer

- All offers and counter-offers, written or verbal, must be presented to the seller in a timely fashion.
- An offer may be presented: In person to the listing agent:
  - In person to the sellers with the listing agent present
  - Via e-mail to the listing agent
  - Via fax to the listing agent
- It is the duty of the buyers’ agent to ensure that the offer represents the full intent of the buyers before said offer is presented to the sellers’ agent.
- It is imperative that the listing agent and the selling agent remain cooperative liaisons between the seller and buyer in order to effect a smooth transaction to close.
- The option check must be delivered to the sellers’ agent or the seller within 48 calendar hours after execution of the contract. The option check should not be delivered to or by the title company.
- The earnest money check must be delivered to the title company within 48 business hours after execution of the contract.

- Present all offers and counter offers on a positive note, showing everything and everyone in the best light.
- Be consistent with the way multiple offers are handled; disclose to everyone or to no one that multiple offers have been received.
- When an offer is negotiated and becomes a contract, *affix executed date*.

## Technology Etiquette

- Use appropriate headings and verbiage for business communications via e-mail and text; use complete sentences and include your e-mail address.
- Send electronic documents (e.g. contracts, disclosures, loan approval) in universal, un-editable format (i.e. PDF file) to prevent any parties from tampering with, adding or deleting parts of documents.
- Include questions about preferred communication media during your client consultation to gauge a client’s technology skills and conduct business accordingly.
- Use discretion when texting; obtain permission before sending text messages to clients and/or fellow agents.
- Use electronic lock boxes to improve showing efficiency and avoid delays.
- Call the listing agent prior to sending an offer to verify contact information and state what type of documents he or she should expect.
- Double check all e-mail recipients and review e-mail messages, including previous messages attached, when sending e-mails to more than one party; e-mail messages cannot be “un-sent”!
- Include a PDF flyer or picture of your property when requesting showing feedback so that agents can remember the property.
- Do not discuss contract details or negotiations, mention clients’ names or contact information or discredit a fellow REALTOR® in an online social media setting (MySpace, Facebook, blogs, etc.).
- Save all e-mail messages related to negotiations and closings for documentation and risk reduction.
- Be aware that large electronic files with attachments or lengthy faxes may be a burden on recipients.
- Be aware of the other parties’ technological limitations; when in doubt, ask.