

**PURPOSE**

The Council uses the information in this form generally as an overview of the real estate services provided by brokerages throughout the province. Coupled with the other financial and records information submitted with the filing of the brokerage's Accountant's Report, it also assists the Council's audit staff to prepare for brokerage office inspections.

**INSTRUCTIONS**

1. This form is to be completed by a managing broker who is licensed in relation to the brokerage.
2. If there is insufficient space on the form, please provide the requested information in an attachment.
3. This form is to be returned to the Council with the Accountant's Report and the financial statements for the brokerage's fiscal year.

**PART A**

The following information is given with respect to \_\_\_\_\_ for the fiscal year  
*(legal name of brokerage)*  
commencing on \_\_\_\_\_ and ending on \_\_\_\_\_.  
*(first day of the brokerage's fiscal year)* *(last day of the brokerage's fiscal year)*

Has the brokerage notified the Council of all business changes during the past fiscal year, as required by section 2-22 of the Rules?  Yes  No *(if no, attach details)*

Number of related licensees as of date signed:

**PART B**

Indicate below the approximate percentage of the brokerage's current total business activities, based on dollar volume, represented by the following activities (total = 100%):

Residential sales	Industrial, commercial, investment sales	Leases	Appraisals
Consulting services	Rental property management	Strata management	

Indicate below the approximate number of transactions the brokerage has been involved with during the past fiscal year:

Residential sales	Industrial, commercial, investment sales	Leases	Appraisals	Consulting services
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Indicate below the approximate number currently managed:

Rental units	Rental property management clients		
Strata lots	Strata corporations with sections	Sections within strata corporations	Total number of strata corporations

Indicate below the average monthly trust balances in all trust accounts relating to:

Trades in real estate <i>(real estate transactions)</i>	Commissions	Strata corporations (including sections)	Rental real estate
\$	\$	\$	\$

Indicate the average monthly total of rents collected:

\$

Indicate the average monthly total of strata fees, excluding special levies, collected on behalf of strata corporations (including sections):

\$

**PART C**

Print name of managing broker	Signature of managing broker	Date MM/DD/YYYY
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## RULES, SECTION 7 7(1)

### Annual financial statements, accountant's report and brokerage activity report

A brokerage must, within 120 days after the end of each fiscal year of the brokerage, file with the council

- (a) financial statements for that fiscal year,
- (b) an accountant's report respecting that fiscal year, completed in accordance with the bylaws, and
- (c) a brokerage activity report respecting that fiscal year, completed in accordance with the bylaws.

## GENERAL BYLAWS, SECTION 4 10

### Annual brokerage activity report

**4-10** (1) A brokerage activity report filed by the brokerage with the council under section 7-7 (1) (c) [*annual brokerage activity report*] of the rules must

- (a) be in a form approved by the council,
- (b) include the information and statements required by this section, and
- (c) be submitted to the council together with the annual accountant's report and financial statements for the applicable fiscal year of the brokerage.

(2) The brokerage activity report must contain, or have attached to it, the following:

- (a) the name of the brokerage;
- (b) the start and end dates of the brokerage's fiscal year in relation to which the report is filed;
- (c) the number of related licensees of the brokerage;
- (d) information respecting any business changes, as referred to in section 2-22 [*brokerage must give notice of business changes*] of the rules, for which notice has not yet been given to the council;
- (e) an estimate of the percentage of the brokerage's current total business that each of the following types of business constitutes:

- (i) residential sales;
- (ii) industrial, commercial and investment sales;
- (iii) leases;
- (iv) appraisals;
- (v) consulting services;
- (vi) rental property management;
- (vii) strata management;

(f) the approximate number of transactions of each type of business as described in paragraph (e) (i) to (v) that the brokerage has been involved with during the fiscal year;

(g) the approximate number of

- (i) rental units,
- (ii) rental property management clients,
- (iii) strata lots,
- (iv) strata corporations with sections,
- (v) sections within strata corporations, and
- (vi) strata corporations in total

currently managed by the brokerage;

(h) the average monthly trust balances in all trust accounts for

- (i) trades in real estate,
- (ii) commissions,
- (iii) strata corporations, including sections, and
- (iv) rental real estate;

(i) the average monthly total of rents collected;

(j) the average monthly total of strata fees, excluding special levies, collected on behalf of strata corporations, including sections.

(3) The brokerage activity report must be completed, dated and signed by a managing broker who is licensed in relation to the brokerage.

Mailing Address	Enquiries
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