

## Record of Referral Fees (Rules, sections 8-5.1 and 8-5.2)

This form is approved for use in preparing and maintaining the records required by sections 8-5.1 (Part B below) and 8-5.2 (Part C below) of the Rules.

### PART A - BROKERAGE INFORMATION

Brokerage name

### PART B - REFERRAL FEES RECEIVED – Complete this part if section 8-5.1 is applicable

A record of the following information is required when a referral fee is received by a brokerage in relation to trading services, and the only trading service provided by the brokerage is the referral of a person to a licensee or a licensee to a person for the purposes of a licensee providing real estate services, or when a referral fee is received by a brokerage in relation to strata management services or rental property management services. **Note:** "referral fee" in this part means remuneration received by a licensee in relation to the following sections of the Rules:

- 5-11(1)(b) - remuneration as a result of recommending a home inspector, mortgage broker, notary public, lawyer or savings institution or any other person providing real estate related products or services to a client,
- 5-11(1)(c) - remuneration as a result of recommending a client to one of the persons noted in the first bullet above, or
- 5-12 - a benefit received from expenditures made by or on behalf of a principal to or on behalf of whom rental or strata management services are or may be provided.

Amount of referral fee received

Date the brokerage received the referral fee

Description sufficient to identify the activity undertaken by the brokerage or related licensee for which the referral fee was received

Name of person who paid referral fee to the brokerage

Name of every person to whom any amount of the referral fee was paid

Date on which referral fee was paid to the person(s) named above

### PART C - REFERRAL FEES PAID – Complete this part if section 8-5.2 is applicable

A record of the following information is required when money is paid by a brokerage in relation to trading services in the form of a referral fee and not in connection with a trade in real estate for which a Trade Record Sheet is required to be retained under section 8-5 of the Rules, or when a referral fee is paid by a brokerage in relation to strata management services or rental property management services. **Note:** "referral fee" in this part means remuneration paid to any person who refers another person to a licensee or a licensee to another person for the purposes of a licensee providing real estate services.

Amount of referral fee

Date the brokerage paid the referral fee

Description sufficient to identify the purpose for which the referral fee was paid

Name of the licensee on whose behalf the referral fee was paid

Name of the person to whom the referral fee was paid