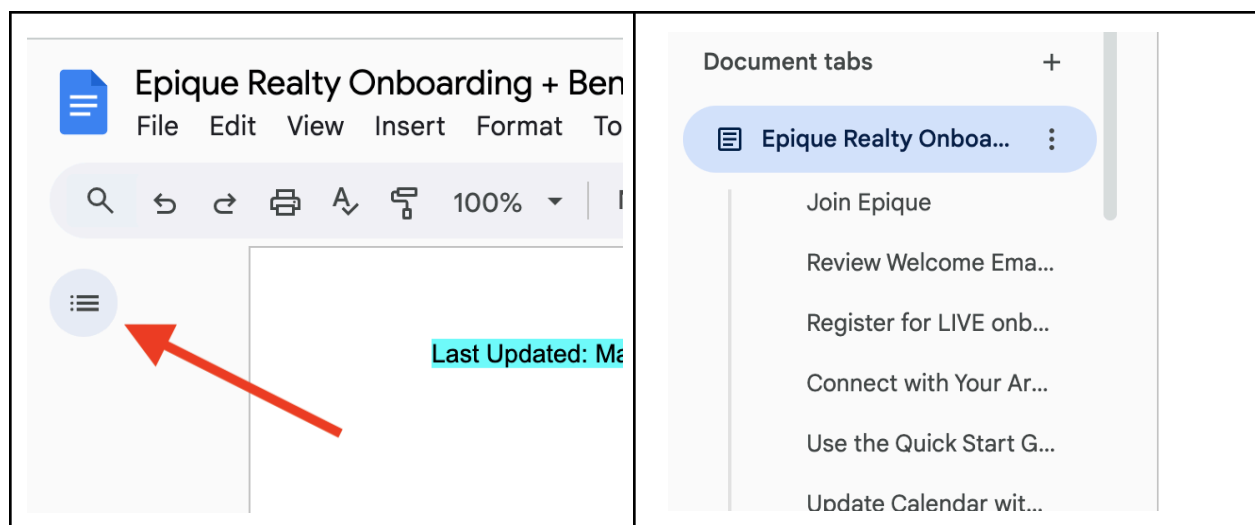


EPIQUE REALTY

Onboarding & Benefit Sign-Up Checklist

- **DO NOT request “edit access” to this document.**
- **To check off tasks, make notes or edit this document >>> [Click here to MAKE A COPY.](#)**
- Then, save to your own Google Drive. Or, download the document.
- To see the live version of this document for ongoing changes, corrections & updates, please click the following link →
[Epique Realty Onboarding + Benefits Checklist](#) .

To see the Table of Contents,
please click on the three “hamburger” lines on the left.



Start Here

☐ Join Epique

- ☐ See [Resource Index](#) for details about action items [before joining Epique](#)
- ☐ Learn more about [action items on Day 1](#), including information about appropriately offboarding your previous brokerage.
- ☐ Read the [Epique ICA](#)

☐ Review Welcome Email you received from Epique. Do the following first:

- ☐ Login to Epique.Cloud on your desktop & download the Epique.cloud app on your mobile devices. Document/save your Epique.Cloud login credentials:
 - My Epique.Cloud Username is: XXXXX
 - My Epique.Cloud Password is: XXXXX

☐ Attend an Epique Journey LIVE onboarding session at Epique

- ☐ These sessions take place 3x a week currently. Check the [MASTER LIST of Epique Meetings \(National\)](#) for the schedule.

☐ Connect with Your Area Leader

- ☐ Your area leader is a critical part of your experience at Epique Realty. They are available as a mentor, coach and resource for all things Epique – for life!
 - Your area leader is listed in your welcome email.
 - If you don't hear from your area leader within 24 hours of receiving your welcome email, please reach out to them directly, or your state broker to ensure you're assigned to the correct person.
 - My Area Leader is: XXX
 - My Area Leader's phone number is: XXX

☐ **Quick Start** – if You Have Deals You Gotta Sign Right NOW

- ☐ If you have active listings to transfer and/or you need to write a contract NOW, then please go to the [Quick Start Guide](#). **If you don't, just continue below.**
- ☐ The Quick Start Guide includes essential info on setting up Dotloop for e-signatures, SISU for Transaction Management & ordering Listing Signs.

☐ **Update Calendar with Epique Meetings**

- ☐ Put Power Wednesdays at noon EST, 11 am Central on your calendar – join live at EpiqueZoom.com.
- ☐ See the [Schedule in Epique.Cloud](#) and add the appropriate meetings you would like to attend to your own calendar, i.e. Power Wednesdays. When you [open this calendar](#), you can click on “Add to Calendar” to subscribe to it on your own Google calendar.
- ☐ You can also view this helpful [Master List of Meetings document](#)
- ☐ Check with your area leader for State & Area meetings schedule – and add to your calendar

☐ **Create AI Headshots**

- ☐ Get unlimited AI headshots & lifestyle shots. Login in to [Epique.Cloud](#) and go to the following link: [Epique AI Headshots](#)
- ☐ We're suggesting this early in the checklist because you may choose to use your AI headshot for your branding needs, i.e. Free sign rider, Free billboard, etc.
- ☐ Consider creating a Google Drive folder and adding your favorite AI headshots there to use for various purposes later.
- ☐ This benefit is one model for 30 days unlimited photos. After the 30 days the model expires and you can't make any more free headshots.

☐ **Know Your Email Address**

- ☐ **Identify your newly assigned company email address** i.e.

JaneSmith@Epique.me. This info comes in your Welcome Email.

- ☐ Please note: This email address will be your username to login to our company tools. This is an email alias that forwards to the email with which you used when you applied to Epique.

- ☐ You will access email sent to your Epique email address by logging into your own email account you used when you applied to Epique. Again, this is where your Epique email will be forwarded to.

■ **My branded company email address is:** XXXX

■ **My company email address is forwarded to:** XXXXX

- ☐ **Learn more about creating your brand in the “[Create Your Brand](#)” section** in the Resource Index – Here, you’ll learn about what to consider when creating your own branded email address & domain.

☐ **Post Your Epique Announcement**

- ☐ Don’t be a secret agent! Let the world know you’ve made a move to Epique.
- ☐ Go to the [Epique Branding & Social Media Templates](#) section of this guide – where you’ll get access to our company’s **Canva Pro account** and use the templates provided in the guide to make your post & update your social profiles.

☐ **Join State & Area groups in the Agent Portal**

- ☐ From the [Epique.Cloud](#), go to "Agent Portal." Search for your State Group and request to join it! You might also find your area group. For help, ask your area leader to help you join the appropriate groups.

☐ **Friend Agents in the Agent Portal**

- ☐ From the Epique.Cloud, you will see "Agents."

- ☐ Search for agents you might know – including your broker and area leader – and add them as a friend! [Find Friends Here](#)

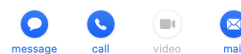
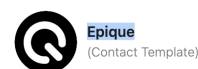
☐ **Order Car Wash Membership**

- ☐ Order [here](#). Once you order and choose your location. Most areas will have car wash services, but those agents in a very rural area may not. Be sure to use your carwash benefit at least once every 30 days...or you may have to re-sign up.

■ **My selected Car Wash Company is:** XXXXX

☐ **Add Contact Card**

- ☐ Upload this contact card file to your phone contacts. This is a contact template with MOST Epique contact info. You will need to update the card with your state broker's email, phone, license number & address. Also, add your area leader's number. [Click here](#) to download the file.



Admin (512) 387-0722
Support (888) 893-3537
Lofty Support (855) 981-7557
Area Leader 1111111111
State Broker 1111111111

FaceTime

Sisu Support sisu@epiquerealty.com
Tech Support support@epiquerealty.com
Lofty Support epique@lofty.com
Empower Texas xxxx@empower-realestate.com
Broker Support XXbroker@epiquerealty.com
Benefits benefits@epiquerealty.com
Transactions transactions@epiquerealty.com
General Support admin@epiquerealty.com
Billing Support billing@epiquerealty.com
CDA Support cda@epiquerealty.com
Epique.Cloud <https://epique.cloud>

☐ **Health Care Benefits Sign Up**

- ☐ Even if you already have health insurance, these FREE benefits are a great supplement, including: Virtual Primary Care Doctor, Urgent Care, Mental Health Visits and FREE prescriptions.
- ☐ Go to [Epique.Cloud](#) and click on "Benefits" to learn about our [health care benefits](#) package and sign up.

☐ **Identify Website URL - Conduct the Standard Lofty Setup**

- ☐ **Identify your newly assigned website subdomain, i.e.** JaneSmith.EpiqueRealty.com.
- ☐ Your Lofty CRM/IDX website account was created for you when you got your Welcome email after joining Epique. Learn more about [setting up your Lofty CRM/website in the Resources Index](#).

- My company website subdomain is: XXXX
- My username & password to Lofty is: XXXX
- ☐ You can forward your own branded domain to your Lofty website. But know this: it's FREE for Epique agents to upgrade your Lofty website with your own custom domain & to customize your website as well for color, layout, widgets, etc.
- ☐ **PLEASE** watch the training on both the standard basic website setup & the custom website upgrade – and then decide which setup is right for you. Learn more about [setting up your Lofty CRM/website in the Index](#).
- ☐ Learn more about what to consider when choosing your own branded, custom domain in the [“Create Your Brand”](#) section in the Resource Index.
- ☐ **Complete LEADS course**
 - ☐ We get free leads at Epique Realty. Leads are first come, first serve. You need to complete the class to access these leads. Locate the Leads Course in your Welcome Email...and/or in the "Training" tab in [Epique.Cloud](#)
- ☐ **Order Agent Billboard**
 - ☐ **Order your Agent Bill Board** (free) [here](#).
 - ☐ You might consider reviewing the [Create Your Brand](#) section of this document before completing this step.
 - ☐ Please note: Listing billboards are also available for when you have a listing priced at \$400K or more. See more details about [Listing Billboards](#) in the Resources Index.
- ☐ **Order Sign Rider**
 - ☐ You get **ONE Agent Sign Rider FREE** to install with your free Epique For Sale sign. Login to [Epique.Cloud](#) to order your FREE sign rider. [Click here to order](#).
 - ☐ Need a For Sale sign installed? Learn more about our [Free Sign benefit](#) in the Resources Index.

☐ **Setup Dotloop Account**

☐ Dotloop is our e-signature program and how we submit contract documents to our state designated broker. You will need to use your Epique Premium account.

☐ Learn more about [setting up Dotloop](#) in the Resources Index. Click [here](#).

☐ **Setup SISU Account**

☐ SISU is how we submit our transactions to our brokerage so that we get paid.

☐ You will be able to successfully set this up AFTER you've set up your Epique Premium Dotloop account.

☐ Learn more about [setting up SISU](#) in the Resources Index. Click [here](#).

☐ **Order Digital Business Card**

☐ You get a free LINQ digital business card!

☐ Login to [Epique.Cloud](#) & order it [here](#).

☐ **Setup Social Bay Account** – a Social Media Content Calendar & Autoposter

☐ You will get an email to set up your Social Bay account from a company called Back at You.

☐ If you can't find this email, you can try using your Epique email address for your login and click on "forgot password." If that doesn't work, email benefits@epiquerealty.com [Login to Social Bay](#)

☐ **Sign up for SparQ** – our Epique Referral Network & Relocation Concierge

☐ You can find the sign up link on the Epique.Cloud dashboard by clicking on "Submit a Referral." Login to [Epique.Cloud](#) and click on the links below.

☐ Learn more: <https://epique.cloud/sparq/> Start SPARQ Onboarding [here](#)

☐ **Setup Realty.com Pro Membership**

- ☐ As an Epique agent, you get a [FREE Realty.com pro membership](#), which includes additional FREE buyer & seller leads, a verified profile & more.
- ☐ You will get an email inviting you to login to your new account with your Epique email address and setup your free profile. OR, visit – <https://portal.realty.com/> Then login with your Epique Email address and click on “forgot password.”
- ☐ Download the Mobile App called “Realty Portal” – it’s a black icon that is for real estate agents, vs the blue for consumers.

☐ **Order Epique Swag**

- ☐ Visit our company’s Zazzle store for business cards, name tags, hats, t-shirts, folders and more. [Click here](#)

☐ **Sign Up for ALL Benefits** – Wait, there’s more!

Go to the Marketing, Benefits & Resources + Bonus Benefits tabs in [Epique.Cloud](#) to find all the benefits you have access to!

- ☐ **Sign up for AirVet (free)**. Have a cat or dog in your life? Save time & money while avoiding stressful visits to the vet with unlimited 24/7 virtual veterinary care. Connect with an expert in less than two minutes. Login to [Epique.Cloud](#) and learn more [here](#).
- ☐ **Access Thanks.io** (free access to a Direct Mail program). Automate your direct mail; connect it to your CRM.
 - ☐ [Watch Thanks.io training here](#)
 - ☐ Login in [Epique.Cloud](#), then click on “Marketing Benefits” and find the link to login to your Thanks.io account.
 - ☐ Also view Thanks.io Epique templates [here](#).
- ☐ **Sign up for 401K**. Login to [Epique.Cloud](#). Then [click here](#) to learn more.

- ☐ **Learn about Epique Edge.** This is a product for your sellers to help them get their home ready for the market. Login to [Epique.Cloud](#) and [Click here](#)
- ☐ **Learn about Clique Offers,** ECHQ & EQTY. Clique Offers is an iBuyer program, while Echo & Equity offer Bridge loan program options. To learn more, login to [Epique.Cloud](#) and [Click here](#).
- ☐ **Learn about Adwerx.** Epique negotiated a 15% discount on your personalized ads delivered on top websites, social media platforms, Streaming TV and digital out-of-home channels. Login to Epique.Cloud and [Click here](#)
- ☐ **Sign up for Dental & Vision insurance bundle** – (This is not a free benefit, but a subsidized one, costing \$30 a month – out the door, after service charge). If you order one, you'll get the other as well. It's a bundle.
 - ☐ Login to [Epique.Cloud](#) and learn more about the [Dental plan](#).
 - ☐ Learn more about the [Vision plan](#).
- ☐ **Check out ReDo.** It is AI-powered remodeling software that also allows for the possibility of renovation assistance for your client! Login to [Epique.Cloud](#) and then [click this link](#) to learn more.
- ☐ **Sign Up for FREE CE Credits.** You get free CE credits when you've been at the brokerage for one year. Sign up [here](#)
- ☐ **Complete Your AI Certification (free).** This is a nationally-recognized certification that costs about \$700. But it's FREE for Epique Agents. It will help you learn how to better use the Epique AI Suite of Tools.
- ☐ **Consider Using Clear Mortgage.** They will pay your transaction fee on your deal when you close with Clear Mortgage. [Learn more](#)
- ☐ **See Coming Soon Benefits**
 - ☐ Roadside Assistance
 - ☐ GRAPHIQ

- ☐ CREATQR
- ☐ Epique en Espanol
- ☐ Global Expansion
- ☐ Luxury Division
- ☐ Commercial Division
- ☐ Urban Care (Tutoring, Babysitting, Eldercare, Petsitting)
- ☐ NEMQ - for when disaster strikes

RESOURCES INDEX

1+ Week Before Joining Epique

- If your state, local board & MLS are open and you're ready to join Epique and offboard from your current brokerage, then let's go! If it's not open yet, then one option you have is to sign a Letter of Intent (LOI) and work with your sponsor to plan your timeline & strategy for a smooth transition.
- [See "States Open" list here](#). This website may not be correctly updated. Ask your sponsor for the newest updates.
- **Please Note:** Signing up with an LOI does not "lock you in" to officially join. But, if you've been on LOI for 90 days and your state, board & MLS are open -- and you don't become official with Epique -- your LOI will expire. ALSO, signing up on LOI allows you to recruit & earn revenue share -- even while under an LOI. Your LOI will expire in 90 days. Email admin@epiquerealty.com for more information about this.

Action Items Before You Join Epique Realty

- **Choose your sponsor.** Get your sponsor's full name registered with Epique & their license number, as you will need this info when you submit the joining application.
 - Your sponsor should be the person who most influenced you to join Epique Realty. **You will want to choose a sponsor at Epique Realty.** If you don't, your state broker is defaulted as your sponsor without an option to change it.
 - To choose your sponsor, you will need to manually enter in your sponsor's name and real estate license number in order to choose them as your sponsor. This is not auto-populated. You will need this whether you join officially or on LOI.
 - Please note: there is no "undoing" your sponsor once you submit your application. If you leave Epique & come back, you will be placed right back under

your same sponsor and/or same place in that organization -- no matter how much time has passed.

- **Connect with your Area Leader.** Your sponsor may be able to connect you with your Epique Area Leader (and/or Epique State Broker) before you officially join Epique. The Area Leader can assist you – along with your sponsor & your broker – in helping you make a smooth transition.
 - Don't wait until after you join or after you onboard to meet with your Area Leader. This person can be a crucial part of your onboarding experience.
 - Be sure to connect to your future Area Leader and ask for help as soon as possible. They will be able to better assist you with preventing potential issues – but only if you choose to involve them ahead of time.
 - If you – for whatever reason – don't connect with your Area Leader prior to joining Epique and/or you don't have their contact information, you will hear from them within 24-48 hours of receiving your Welcome Email. Either way, connect with them promptly.
 - **Read the Epique Realty Independent Contractor Agreement.** Let your sponsor and/or area leader know if you have questions. [Epique ICA](#)
 - **Read & understand your previous/current brokerage's ICA** and Policies & Procedures regarding termination – in regards to stock, rev share, active listings, pending contracts.
-

Day 1: Join Epique Realty

Action Items on the Day You Join Epique Realty

- **Join Epique.** [Join Link](#)
 - During the application process, you will need a headshot (or at least a perfectly good selfie). You will also be providing your email address – to which all your Epique email will be forwarded – your banking info for direct deposit, as well as other identification information.
 - Be sure you have your sponsor's correct name and license number. Remember, your sponsor choice CANNOT be undone....ever.
 - You can join as an individual agent, a team leader, a team member or a family team. Please note that your team will need to be approved by leadership within 30 days after joining.
 - Initial cost includes a one-time sign up fee is \$99 + \$149 a month, so initial cost will be \$248, plus a transaction fee. You can opt to pay upfront for the year -- which works out to \$99 a month. Team members pay a one-time \$99 sign up fee + \$99 a month.
 - **Please note:** MLS fees and local board fees are separate.
- **Save & bookmark your welcome email.** It could take about 24-72 hours for you to get your welcome email. Epique is working on creating your accounts ahead of time, so the company can send you your ONE "Welcome to Epique" email with everything you need to get started.
 - Just in case -- ensure your signup fee charges came out of your bank account. Check your spam/junk folders.
- **Transfer your license.** Your level of involvement to transfer your license to Epique depends on your state & local board. You might call your local board to get assistance.
 - For questions, contact your new Epique state broker -- email will be the 2-letter state identifier+broker@epiquerealty.com (i.e. TXbroker@epiquerealty.com)

- Reach out to Area Leader and/or State Broker and/or Local Board for information and assistance for a successful license transfer to Epique Realty.
 - **Save Your Pocket Card**
 - **Ensure you receive & save a digital copy of your license** (i.e. pocket card) with your new Epique employing broker information. *(This depends on your state/province)*
-

Offboard Previous Brokerage

Ensure you complete all the steps to properly offboard from your previous brokerage.

- Let your broker know you are making a change and ask them any questions you have regarding any of your pending deals, active listings, etc.
 - When you tell your broker you're offboarding, you will likely get an offboarding email with details, regarding Stock, the offboarding form, etc.
 - **Begin completing your Epique Onboarding tasks.**
-

Create Your Brand

Here is a FULL [Marketing Launch Kit training](#) on creating your brand from start to finish

Your Branded Contact Info

Initially, the three most important aspects of your brand are

- 1) Your Domain
- 2) Your Email
- 3) Your Phone Number.

These should be tools you own and control, not company provided. For example, if you previously promoted your company provided domain, email address or brokerage associated phone number...now you have to relaunch your brand completely.

My ideal option I recommend is to buy a domain from GoDaddy; create a Google Workspace for your branded email and to get organized; and then add on a Google Voice number to your Google Workspace as your “business phone.” Scroll down to learn more about Google Workspace.

With a domain, email address and phone number you own and control...a transition to a new brokerage is much smoother. Not only that, you look more professional and are acting like it.

Identify a domain you want to use for your primary brand, i.e. SylviaDana.com. Do this at GoDaddy.com (they have great support and integrate with many other systems). My second choice is Hover.com

PLEASE NOTE Epique Realty branding rules in addition to NAR trademark rules.

1. You cannot use “Epique” in an email address, domain name or social media profile title. (On a SM profile title, you could use your name or your team name, brokered by Epique Realty.)
2. You cannot use “Realtor” with a location word or a description word in an email address, domain name or social media profile title. You can only use the term realtor with your name on your license.

Choices of how to use your domain to direct to your website

- Forward it to your Epique Realty website (Lofty)
- OR make it the custom domain for your Epique Realty website (Lofty)
- OR make it the domain for your own custom Wordpress website

Choices of how to use your domain to direct to your email address

When you buy a domain, I DO **NOT** RECOMMEND using the domain provider’s email alias free option, nor do I recommend their Microsoft 365 paid option. INSTEAD, create a Google Workspace.

[LEARN MORE ABOUT GOOGLE WORKSPACE HERE](#)

Not only will you look more professional, but your email will be more secure and have better deliverability. You can also add additional users to your workspace, like an assistant for example.

With Google Workspace, sign up with the free trial for 14 days. Once you're setup, go into your Workspace admin console, then go to >>> Billing, then >>> Subscriptions...and click on "Add or Upgrade"....this will allow you to Downgrade to the \$6 a month option with the starter plan.

Choices for your business phone number

Maybe you want to use your own cell phone number for your primary business number. This is perfectly fine.

However, if you aren't comfortable with having your cell phone as your business phone. And/OR...you want a "business number" -- that even a Virtual Assistant in the Philippines could use/manage on your behalf, you might consider adding a Google Voice number to your Google Workspace, then assign the Google Voice number to the Google Workspace email that you want to associate it with.

Google Voice can be downloaded as an app on yours or your assistants phone. It can also be used on a Desktop/laptop.

You also have an option to add a personal number or a dialer phone number with Lofty for lead generation.

Here is a FULL [Marketing Launch Kit training](#) on creating your brand from start to finish

Epique Branding & Social Media Templates

We get access to Epique's Canva pro account and EVERYONE is in there. It's nice because you can get ideas and see what others are creating and make a copy. However, it can sometimes be a challenge to manage and organize your own creations.

So I recommend you go to the Epique account to access the designs you want or create your own designs. Create a folder in the Canva account with your name on it. You might also consider sharing the designs to your own Canva account and making a copy of them there. (In case others edit – instead of make a copy of – your own designs after the fact.

Login to Epique's Canva Pro:

CanvaPRO Login

Username: canva@epiquerealty.com

Password: 2025Epique&

Once logged in, click on the links below – When you open the link it will be in “View Only” mode. Go to "File" and "Make a Copy.” Rename the file including your name and put in your own folder if you'd like. Now, you can edit the design with your own photo and information to use.

I AM EPIQUE Announcement Template	New Agent Epique Announcement
Facebook Cover Templates	Social Media Templates
Email Signature Templates	Epique Logos & Branding Guidelines
Multipurpose Banner Templates	

Update Your Online Profiles

Update your key profiles, including Zillow, Realtor.com, your Local Association profile, MLS profile, Google My Business, Facebook Business Pages, etc.

[See Slides for Creating Your Brand & Updating ALL YOUR PROFILES](#)

Conduct Lofty Setup

Conduct an initial Lofty setup for your standard enterprise account. Lofty is your CRM. You will learn about how to conduct an initial setup by completing the onboarding course as directed above. This will likely take you less than an hour...maybe even just a few minutes -- depending how deep you go.

There is nothing to buy when you do this initial setup. Skip those offers. You will be able to learn more about your Lofty account and do more customization and add-ons later.

For now, watch Adam's class on setting up BOTH the standard website & custom website. Then decide what is best for your business. Adam recommends IMMEDIATELY upgrading to the Custom "Agent Website" upgrade for FREE at Epique (normally \$50 a month).

Just know that you if you upgrade, you will have to have purchased a domain, do the custom website setup and then have to facilitate getting the IDX approved with your broker and MLS/board, etc.

- Timeblock time to take Lofty training over the next 14 days.
 - [HERE IS ADAM FRANK'S FREE LOFTY TRAINING FOR EPIQUE AGENTS ONLY](#) - This training will help you do the standard website setup. (There's also a section on doing the custom website setup.) And...also a section on importing your contacts, using the smart plans, setting up search alerts, etc.
 - Attend Adam's live Q & A at 3 p.m. EST on Wednesdays at LetsTalkLofty.com
-

Setup Dotloop + SISU

☐ Dotloop Account

- ☐ Your Dotloop setup info comes in your Welcome Email you received when you joined Epique. Dotloop is our e-signature program and how we submit contract documents to our state designated broker. You will need to use your Epique Premium account.
- ☐ You will get an email that a Dotloop account has been created for you. The email you get will have a link for you to set up your new Dotloop Account. **If you currently have another Dotloop account, be SURE to completely log out of it – and also be sure your own account is not associated with your Epique.me email address – before setting up your new Epique Dotloop account with your Epique.me email address.**
- ☐ **You must be a member of a board and an MLS** in order to access the contract templates in Dotloop that are associated with your local boards and MLSs.
- ☐ You will find the Dotloop training in the "Training" section of Epique.Cloud. Login to Epique.Cloud and follow the link here for the Dotloop Setup Training - <https://agentportal.io/video/play/311>

☐ **SISU Account**

- ☐ Your SISU setup info comes in your Welcome Email you received when you joined Epique. SISU is how we submit our transactions to our brokerage so that we get paid. You will be able to successfully set this up once you've set up your Epique Premium Dotloop account. The email you get will have a link for you to set up your new SISU Account.
- ☐ From SISU, you will create a transaction. Then, you will request your own Commission Disbursement Authorization (CDA) that the broker will need to approve. You will want to do this at least 5 days before closing if possible. In addition, continue to update the transaction info & CDA if there are any changes to the deal, such as the closing date, commission amounts, etc.
- ☐ Upon CDA approval from the broker, the CDA will be sent to the title company or attorney contact email you provided. The CDA will provide instructions to your escrow representative in regards to the commission amount and how to pay you. You will be provided a commission check in "pay at the table states" OR Wiring Instructions to Epique (and then direct deposited to you) for other states. The CDA will usually deliver to your escrow company contact's email the day before the closing.
- ☐ Keep in mind, a CDA is only commission disbursement instructions. An approved CDA is not a title order submitted to your escrow officer. You must submit your own title order to your escrow officer in regards to your commission percentage/amount, admin fee, co-op agent info, lender info, etc.
- ☐ You will find the SISU training in the "Transactions" section of Epique.Cloud. Login to Epique.Cloud and follow the link here for the Quick Start Videos on setting up SISU - <https://epique.cloud/sisu-2/>

☐ **Steps to Get Paid** – [Steps for Getting Paid at Epique](#)

Production Benefits

- ☐ **Free Listing Photos** - for your Residential Listings
 - ☐ We get free listing photos for our residential listings (not vacant land or commercial properties. [Click here to order.](#)
 - ☐ You will get at least 15+ high resolution, professional real estate photos within about 24 hours of the photo appointment. They will be emailed to you with a website link to view and download the photos. This is FREE. You will also have the option to pay for upgrades, such as a twilight photo, when you order.
 - ☐ We recommend you order the photos at least 5-7 days before your listing goes live. If the system detects there may be no listing photographer in your area, you will be notified to send an email with details about your listing. If it's confirmed there is no photographer, Boulevard media will ask you for your listing agreement and then deposit \$125 in your account.
- ☐ **Free Signs & Sign installs** - for your Residential Listings
 - ☐ We get Free Signs & Sign installs for ALL your Residential Listings – not vacant land or commercial properties. [Order here](#)
 - ☐ When you order, you may be notified there is no sign installer in the area for your listing – and that you will be mailed a 24x24 sign to install in your own sign holder/frame/post. This gets mailed to you quickly...in 48-72 hours usually.
 - ☐ You will need to add your own sign rider to the post & sign that is installed for you. (If you haven't ordered your one FREE sign ready yet, do that [here](#))
 - ☐ If you want to use your own custom sign instead, you can! You'll just be the one to manually replace the free sign to your custom sign after the install...and then switch it back before you order the sign removal.
 - ☐ If you want additional sign riders, open house signs and your own custom signs, you can order your own Epique pre-templated signs & Riders at [Oakley Signs](#).

- ☐ You can also check out [Build a Sign](#) – they have some options with Epique Templates -- 24EPIQUE50FS
 - ☐ **Free Social Media Ad** - for your Residential Listings
 - ☐ We get a free social media ad run for us through Lofty (if you've set Lofty up with your MLS ID) residential listings at a price point of \$400K or more. And YOU get all the leads.
 - ☐ These leads are NOT put in the Lofty Lead Pond. This is automatic...there's nothing you have to do, except to ensure your at least your standard Lofty profile setup with Lofty is complete with your correct MLS ID.
 - ☐ **Free Listing Billboards** - for your Residential Listings
 - ☐ For residential listings priced at \$400K or more, you can order a listing billboard, which will run for 7 days! (If electronic digital billboards are available in your city).
 - ☐ Login to [Epique.Cloud](#) and order [here](#).
 - ☐ **Free Virtual Staging**
 - ☐ Login to Epique.Cloud and go to the A.I. Assistant to find the Virtual Staging app. You can use up to 50 uploads per month! [Click here](#).
 - ☐ **Free Transaction Coordinator** - for your Residential Listings
 - ☐ Get Transaction Coordinator support for your deal. This includes paperwork upload to Dotloop, contract-to-close support or compliance-only TC support. Go to Epique.Cloud and then find the "Transactions" tab. Then, click on [Use the TC](#). **PLEASE** notice a separate link to choose if you're in Arizona or California.
 - ☐ **Zillow Showcase** - for your Residential Listings
 - ☐ For \$250, you can showcase your listing on Zillow. No contracts, no monthly fees. Just a great way to get more leads & show your value to sellers. [Learn more](#)
-

Coaching Programs

☐ **POWER ACADEMY + Earth to Orbit (free)**

- ☐ Includes: Earth to Orbit with Rob Stein This is a free-to-Epique agents meat-and-potatoes real estate coaching program – these are the steps for new or re-launching agents how how to do the business!.
- ☐ Includes a weekly Weekly Mindset Coaching Call + a weekly Q & A on Zoom. See the [MASTER LIST of Epique Meetings \(National\)](#)
- ☐ Coming Soon: Contracts classes from your area leaders & state broker
- ☐ Coming Soon: Complete Epique systems training
- ☐ Go to [Epique.Cloud](#) and [click here](#) to learn more.

☐ **Agent Hub 360 (free)**

- ☐ This is a free-to-Epique agents coaching program – focusing on growing & scaling your business.
- ☐ Includes a weekly CEO Mastermind on Zoom. See the [MASTER LIST of Epique Meetings \(National\)](#)
- ☐ Go to [Epique.Cloud](#) and [click here](#) to learn more.

☐ **Sell it Like Serhant (free)**

- ☐ Ryan Serhant sells the most real estate in the world, and we have access to his on-demand coaching program for FREE.
- ☐ Go to [Epique.Cloud](#) and [click here](#) to learn more.

Support & Admin

☐ Open a Support Ticket

- ☐ Have a question, concern, tech issue at our company?
- ☐ You can open a support ticket via [Epique.Cloud](#) and click on “Support” [here](#).

☐ View Agent Dashboard

- ☐ Go to [Epique.Cloud](#) and click on the “[Reports](#)” to review your basic agent profile, your rev share and your transactions.
- ☐ For issues or questions, open a support ticket.

☐ Update Your Billing & Contact Info

- ☐ Have a new bank account or a new mailing address? You can change your billing info, direct deposit account and contact info, such as your email address.
- ☐ To update, login in to Epique.Cloud. Find where it says “Need to edit something?” – or [click here](#).

☐ Find State Company Docs

- ☐ Looking for E & O insurance proof, your state’s W9 info, etc?
- ☐ Go to the dashboard in Epique.Cloud under the “Manage Deals” widget and click on the “Company Docs” button or click [here](#).

☐ Add a Beneficiary

- ☐ Your loved one can get your revenue share if you pass away.
- ☐ Go to the dashboard in Epique.Cloud under the “Need Help?” communication widget and click on the “Add a Beneficiary” button or click [here](#).

☐ **Maternity/Paternity Leave** - 2 months paused payments

- ☐ If you have a baby, you can request maternity leave, in which your monthly payments for the brokerage fee to Epique are paused for 2 months! Fill out [this form](#) out and send communication to Billing@epiquereality.com when completed.
-

Epique Realty Agent Benefits Checklist

Use this checklist to activate every benefit that comes with being an Epique Realty agent. Make a copy in Google Docs to track your progress.

Getting Started

- Join Epique + complete application
 - Attend Epique Journey Live onboarding session
 - Connect with your Area Leader
 - Read and save your Welcome Email
 - Log into Epique.Cloud and install mobile app
 - Post your “I joined Epique!” social announcement
 - Add recurring Epique meetings to your calendar
-

Branding & Marketing Tools

- Create AI headshots (30-day model)
- Access Canva Pro & templates (announcement, social, etc.)
- Update all your online profiles (Zillow, GMB, Realtor.com, etc.)
- Create branded email + domain (via Google Workspace)
- Order your **free sign rider**
- Order your **free agent billboard**
- Order your **free LINQ digital business card**

- Activate Social Bay (automated social media posting)
-

Tech Systems Setup

- Set up Lofty CRM + IDX Website
 - (Optional) Upgrade Lofty to custom domain version
 - Set up Dotloop (e-signatures)
 - Set up SISU (transaction tracking + CDAs)
 - Access Thanks.io for automated direct mail
 - Set up Realty.com Pro Membership
 - Download Realty Portal App
 - Join Agent Portal state/area groups
 - Friend agents and your broker on the platform
-

Lead Generation & Referrals

- Complete Leads Course for access to company-provided leads
 - Join SPARQ referral network & relocation concierge
 - Use Realty.com for free buyer & seller leads
 - Set up Thanks.io automation for lead follow-up
-

Benefits & Perks

- Sign up for **health care** (virtual doctor, Rx, mental health)
 - Sign up for **AirVet** (24/7 virtual vet care)
 - Sign up for **401K**
 - Sign up for **Dental & Vision** bundle (\$30/month)
 - Order **car wash membership**
 - Claim your **free CE credits** (after 1 year)
 - Add a **beneficiary** for your rev share
 - Request **maternity/paternity leave** (2 months payment pause)
-



Listing & Transaction Benefits

- Get **free professional listing photos**
 - Order **free listing signs & installs**
 - Trigger **free social media ad** for \$400K+ listings
 - Order **free digital billboard** for \$400K+ listings
 - Use **free virtual staging** (50 uploads/mo)
 - Request **free transaction coordinator**
 - Learn about **Zillow Showcase** (\$250 option for extra exposure)
-



Coaching & Training

- Join **Power Academy + Earth to Orbit**

- Join **Agent Hub 360** CEO coaching program
 - Access **Sell It Like Serhant** on-demand training
 - Complete **AI Certification**
 - Attend live trainings (Lofty, Dotloop, SISU, area calls)
-



Extra Tools to Explore

- Learn about **Epique Edge** (prep listings)
 - Use **Clique Offers** (iBuyer program)
 - Explore **ECHQ & EQTY** (bridge loan options)
 - Use **Adwerx** (15% discount on custom ads)
 - Try **ReDo** (AI-powered renovation tool)
-



Admin & Support

- Open a **support ticket** when needed
 - View your **agent dashboard** (transactions + rev share)
 - Update billing and direct deposit info
 - Access **state/company docs** (W9, E&O, etc.)
-



Coming Soon

- Roadside Assistance

- GRAPHIQ
- CREATQR
- Epique en Español
- Global, Luxury & Commercial Divisions
- Urban Care (childcare, eldercare, petcare)
- NEMQ (natural disaster relief support)