



Referral Form Instructions – Receiving Broker

1. **Agent Information:** Enter the contact details of both the Originating and Receiving Agent.
2. **Client Details:** Ensure the correct Client Information box is checked and their contact details are provided.
3. **Referral Terms:** Specify the “Effective Until” date and referral amount (percentage or flat fee) in the “Referral Term / Acceptance” section.
4. **Signatures:** Both agents must sign and date the agreement.
5. **Paperless Pipeline Entry:** Create a transaction in Paperless Pipeline, naming it with the property address and client’s name.
6. **Transaction Details:** In the “Edit Transaction” screen, enter the referral amount under “Referral Amount – Must Have Agreement” and include the Originating Broker’s name and address in the “Commission Summary” section.
7. **Upload Agreement:** Attach the completed Referral Agreement to the file.
8. **Commission Processing:** Upon receipt of your commission, we will update the file and notify you via email.



Referral Agreement
Platinum Realty LLC
Receiving Broker

Originating Brokerage: _____

Agent: _____

Address: _____

Phone: _____

Receiving Platinum Realty LLC Agent: _____

E-mail: _____

Phone: _____

**** Client Information (check one):** ☐ Seller ☐ Buyer ☐ Landlord ☐ Tenant

Name: _____ Phone: _____

Address: _____ E-Mail: _____

NOTE: If Client is contemplating more than one transaction at the same time (e.g., purchase of one property and sale of another, or the purchase, sale or lease of two or more properties), then a Referral Agreement should be entered into for each such transaction to document any Referral Fee that may become due.

Referral Term / Acceptance

This Referral Agreement shall commence on the date signed by Receiving Agent (unless otherwise specified) and shall remain in effect until the day of ____, 20___. Special Terms and Agreements (e.g., specify Client special needs or instructions, such as market area to be covered):

By signing below, Receiving Agent accepts this referral and within days ____ (10 days if none stated) of closing of the transaction, shall pay Originating Broker a **"Referral Fee"** of ____% or \$_____ of the gross commission amount received by Receiving Broker.

****Note:** The Originating side agent is the agent who is referring a client (buyer/seller) to another agent. A Referral Fee will be deducted from the commission amount you receive. Receiving agent pays Referral Commission to Originating agent.

Receiving Side (Paying Referral) – Platinum Realty LLC

Agent Signature: _____

Print Name: _____

Date Signed: _____

Originating Side (Sending Referral)

Agent Signature: _____

Print Name: _____

Date Signed: _____

****Please provide Platinum Realty with a copy of broker W-9 to avoid delays in processing payment. Please fill out the attached W-9 & return as soon as possible in one of the flowing manners:**

Email – Accounting@movewithplatinum.com

Send via Mail – Platinum Realty LLC – 9393 W 110th St Suite 170 – Overland Park, KS 66210

**Request for Taxpayer
Identification Number and Certification**

Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
requester. Do not
send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) Platinum Realty LLC	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.)
	2 Business name/disregarded entity name, if different from above. dba/ URE Platinum Realty LLC	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☒ Partnership ☐ Trust/estate ☒ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) P Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. ☐ Other (see instructions)	
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐	
	5 Address (number, street, and apt. or suite no.). See instructions. 9393 W. 110th Street, Suite 170	
6 City, state, and ZIP code Overland Park, KS. 66210		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number										
			-				-			
or										
Employer identification number										
2	0	-	2	8	7	1	5	4	5	

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person <i>Poh-Spaulk, Corporate Controller, UREG</i>	Date <i>3-13-26</i>
------------------	---	------------------------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they