

*The*



**COLDWELL BANKER**

**HEARTHSIDE**

*Way*



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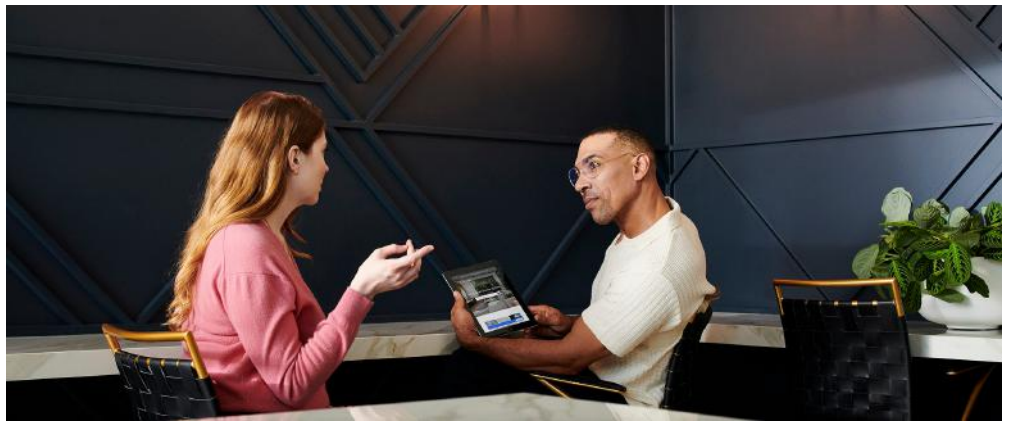
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# THIS IS THE REAL ESTATE COMPANY THAT SHINES LIKE NO OTHER

The Coldwell Banker® brand is the North Star of the real estate industry. Guiding people to the homes of their dreams and leading affiliated agents to a successful and fulfilling professional path has been our calling for well over a century. It's a passion and pursuit we take deep pride in, creating and exceeding impeccable standards in every aspect of the real estate experience.

We are a brand devoted to the service of our clients, the success of our network, and the remarkable power of home. We're committed to creating dominant winners in every market we serve. It's something we call the Coldwell Banker Way.

And because of our dedication to being the best in the craft, more people have turned to us to help them find and sell their homes than any other company in the history of America.

We invite you to learn more about the Coldwell Banker Way in the following pages. Our depth of care, production-boosting resources, and inspiring culture make this company an extraordinary home for real estate professionals.







# AT COLDWELL BANKER HEARTHSTONE, OUR CREDO IS FAMILY FIRST.

That's because we are a family-run business built on integrity, expertise, and a supportive environment where people work together to effect positive change in cities, towns, and neighborhoods throughout Pennsylvania, New Jersey, and Delaware. We invest in high achievers through continual training and development programs designed to prepare them for all types of real estate challenges so that they can deliver the very best experience to every client we serve.

When we founded Coldwell Banker Hearthstone in 1991, our goal was to deliver an unsurpassed experience for every buyer, seller, agent, and employee.

Led by core values like TRUST, LOYALTY, and FAIRNESS, we quickly became the preferred choice in the markets we serve.

The key to our success as an industry leader is – and has always been – treating everyone like they are FAMILY. That's the Coldwell Banker Hearthstone difference.

## SALES CENTER LOCATIONS INCLUDE

- Allentown, PA
- Bethlehem, PA
- Collegeville, PA
- Doylestown, PA
- Easton, PA
- Frenchtown, NJ
- Hellertown, PA
- Huntingdon Valley, PA
- Lahaska, PA
- Lansdale, PA
- Newtown, PA
- Ottsville, PA
- Pocono, PA
- Wind Gap, PA
- Commercial Division, Lahaska, PA



**HEARTHSIDE**  
AT YOUR SIDE





# A CULTURE OF CARING

We're proud to say that Coldwell Banker affiliated agents and offices leave their mark on their communities in incredibly positive ways. Our charitable initiatives make getting involved and making new connections in your neighborhood easy and rewarding.

Coldwell Banker Hearthside, a regional market leader in real estate sales, formalized its culture of giving back to its communities by introducing Hearthside At Your Side. Hearthside At Your Side is an agent-led initiative that focuses on giving back to community organizations within the Coldwell Banker Hearthside footprint in various areas, such as those in need, military families, local food banks, adopt-a-pet programs, and much more.

"Coldwell Banker Hearthside has a long-standing heritage of community giving. With more than 400 agents and 50 employees, we have significant reach into the areas and neighborhoods where we operate, and it's through that reach that we can make a real difference," said Jamie Mancuso, President of Coldwell Banker Hearthside. Last year, the company donated approximately \$35,000 to community groups and the volunteer hours of individual agents and employees.



**\$243 BILLION IN  
SALES VOLUME**





# A PREMIER DESTINATION FOR REAL ESTATE AGENTS.

The things that matter to you are the things that matter to us. We are connected and in constant dialogue with our affiliated agents and brokers across the country and worldwide, learning your needs and challenges and supporting you with tools and resources that make a real difference in your market. Agents who join our network discover the powerful benefits of being a part of the Coldwell Banker® community; here, we spotlight a few critical ones.

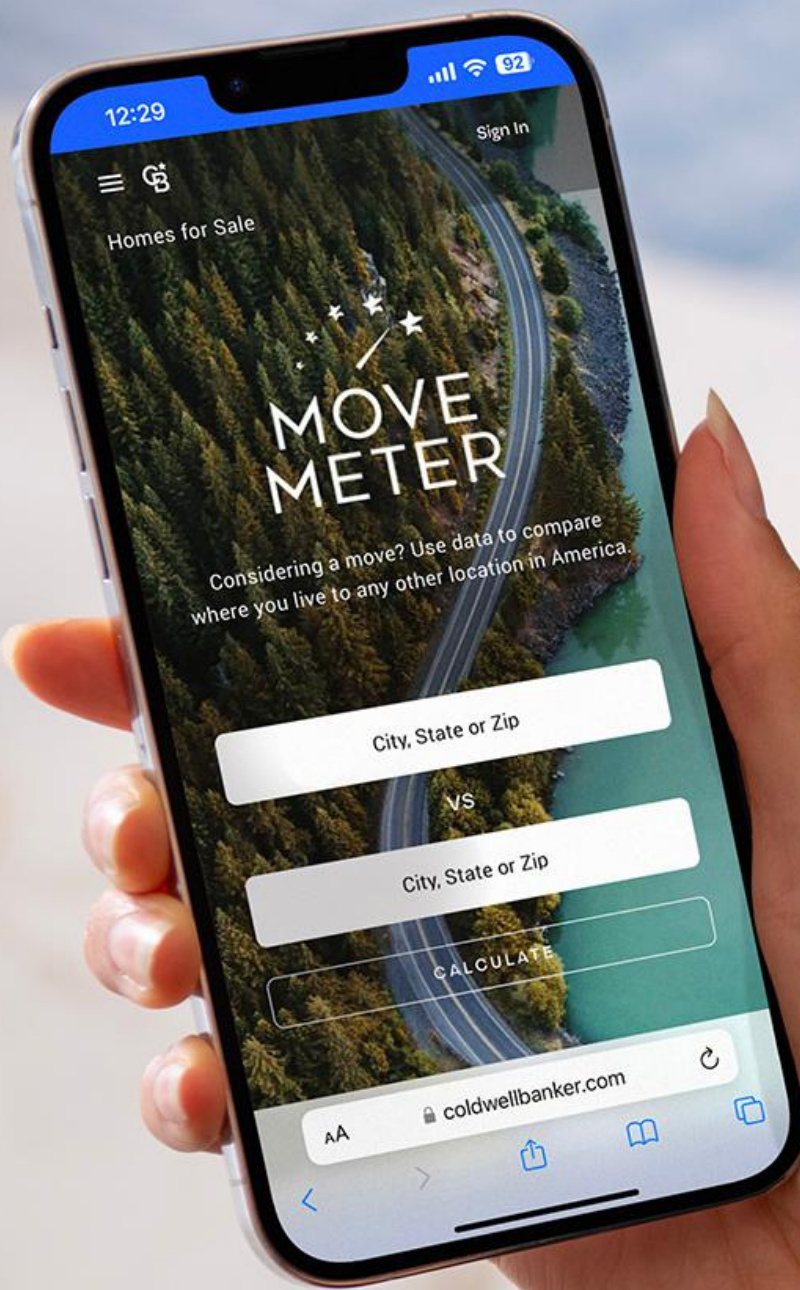
Coldwell Banker is ranked #1 in agent loyalty. We're honored to say this. And we're so proud to be a home where people of diverse backgrounds and experiences thrive. Our way of doing things has made us the premier destination for agents who want results, and it's earned their loyalty. Every day, our brand delivers at the high standard demanded by the industry's best agents and brokers.

Our extensive Coldwell Banker University® courses are second to none. We are committed to empowering real estate professionals to grow their businesses, exceed their goals, and live well by offering world-class coaching, education, and support for lasting impact.

**What's more, our powerful brand presence pays dividends. In countless communities across the world, Coldwell Banker yard signs command their markets. This is an extraordinary brand that's empowered our network to transact \$243 billion in sales volume in 2024.**

The Coldwell Banker brand is continuously dedicated to helping our people reach new heights of success.





**OUR INDUSTRY  
EXCLUSIVE MOVE  
METER - DEEMED THE  
MOST USEFUL TOOL  
IN THE REAL ESTATE  
INDUSTRY.**

# A WORLD-CLASS TECHNOLOGY SUITE.

Discover why Coldwell Banker® technology and services are second to none. These cutting-edge and easy-to-use tools help you generate more leads, automate your marketing, and make your business more efficient.

## **CBDESK**

With CB Desk, you only need one login to access all the products and programs the Coldwell Banker brand offers. It combines everything you love about an intranet, news site, and search engine into one easy-to-use application.

## **EXCLUSIVE LOOK**

You can leverage the strength of your Coldwell Banker network and promote your listing before it goes live on the market. Agents and teams who used Exclusive Look earned \$36.5K more.

## **MARKETING CENTER**

Save time and easily create beautiful materials in minutes. Automate your marketing and stylishly promote yourself and your listings with customizable social assets, videos, and print integration.

## **BOOST, POWERED BY LONE WOLF**

Easily advertise your business and properties on social media and other digital platforms.

## **PROSPECT SQUARE**

Stay in touch with your contacts with automated, customizable reports and an e-marketing center. Agents and teams who used Prospect Square earned \$25.7K more.

## **MOXIPRESENT®**

MoxiPresent® creates sleek, customizable, showstopping CMAs, luxury presentations, open house flyers, and neighborhood tours. Agents and teams who used MoxiPresent are 1.4x more productive.

## **MOXIWEBSITES®**

MoxiWebsites® allows you (or your team) to create a professional, custom website in minutes, using its easy-to-use and versatile content management system and collection of branded webpage templates.

## **MOXIENGAGE®**

MoxiEngage® is a powerful CRM and business planner that allows you to manage your entire book of business, create marketing campaigns, set your sales goals, and get data-driven insights that help you achieve them.

## **MOXIIMPRESS®**

MoxiImpress® helps you promote your listings by allowing you to automatically create and distribute print, digital, and social media advertising materials in a matter of minutes.





# HELP GROW YOUR SKILLS AND BUSINESS WITH EXCEPTIONAL EDUCATION.

## **Hearthside Education**

### **Sales | Tools | Business Builder | Strategy Sessions**

From setting goals to leveraging your resources, winning listings, to negotiating transactions, the skills taught will help propel you to higher productivity and a more prosperous future. Weekly training sessions include CBH Sales and Tools Training, Marketing & Tech Tools, Business Builder, and CBH Sponsored Continuing Education For License Renewal.

## **Coldwell Banker University®**

Coldwell Banker University is a remarkably powerful resource where Coldwell Banker® affiliated agents develop and sharpen their skills. Discover dynamic in-person and virtual programs designed to help you throughout your career, covering topics like maximized productivity, negotiating skills, listing presentations, team-building, and more. In 2023, our instructors earned a Net Promoter Score (NPS) of 961, which is quite significant, considering it comes from the gold standard in customer experience metrics, and a score of 80 or above is considered world-class. Notably, we logged over 110,000 total course registrations in 2023, which translates to a registration every five minutes from our dedicated affiliated agent community.

### **The Coldwell Banker University® course feedback is compelling:**

- “Priceless info for all agents, new and old! It makes our job easier. It gives us that edge of confidence!”
- “Knowledge, insights, tips, and tricks, so much to learn and know! This is my second time taking the course in a year.”
- “It provided me the needed tools to get my business going.”

## **Luxury Property Specialist Certification**

This powerful and elite course provides the foundation for a successful business representing exceptional properties and an affluent clientele. It's a remarkable opportunity to learn from top luxury specialists at the Coldwell Banker brand and superstar agents across the industry. Affiliated agents with Luxury Property Specialist Certification sell properties at an average \$200K higher sales price.





# WE'RE HERE TO SUPPORT YOU.

You have an expansive team of support people behind you every step of the way. We provide unparalleled resources in technology, lead generation, relocation, referrals, and personalized marketing to help our agents reach their sales and revenue goals in an environment that is geared toward success.

## SUPPORT IS OUR SPECIALTY

Local In-Office Managers

Relocation Services

In-House Legal Counsel

Referral Coordinators

In-House Technology Support

Lead Center Support Team

Agent Development Support

Transaction Coordinators

Accountability Support

Title Closers

Marketing Specialists

Mortgage Services

Social Media Specialists

Business Building Support

Global Luxury Support Team

Onboarding Team





# YOU ARE YOUR OWN BRAND

Discover the advantage of tailored marketing with BlueEdge Marketing, your exclusive in-house marketing partner at Coldwell Banker Hearthside. Designed specifically to empower realtors, BlueEdge understands the challenges of balancing marketing efforts while managing your real estate business. We recognize that your time, resources, and expertise are precious, and that's where we step in.

With BlueEdge, you're not just hiring a service; you're partnering with a dedicated team of Marketing Advisors who will collaborate closely with you to craft a comprehensive marketing plan. Our focus is on enhancing your presence in your sphere of influence, innovatively farming for new business, and expertly marketing your listings.

Leverage the esteemed Coldwell Banker brand while distinguishing your personal brand through our services. Our professional designers and digital marketing specialists are poised to deliver exceptional custom designs tailored to your needs, including logos, brochures, postcards, ads, and dynamic social media graphics.

Elevate your real estate business to new heights with BlueEdge Marketing. Start crafting your unique marketing plan today and watch your business not just grow, but thrive.







# CONNECT CLOSING IS YOUR TRANSACTION ASSISTANT

Your Transaction Coordinator will manage all of the administrative paperwork and deadlines involved in your real estate transaction from contract to close and everything in between.

Connect Closing offers unparalleled security that will lock down your private information. Because fraud is at an all-time high, we are locking this down with a secure portal and one point of contact.

We will treat every transaction with the utmost care and concern and, most importantly, keep YOU at the center of the transaction and well-informed at every step.

# GROW YOUR BUSINESS THROUGH HAPPY CUSTOMERS

Testimonial Tree is the leading online reputation management company. This testimonial software makes it easy to collect authentic testimonials from happy customers and automatically shares the best stories online to attract new customers. Coldwell Banker Hearthside provides this service to our agents complimentary as a means of empowering our professionals.

With Testimonial Tree, you automatically decide when a testimonial request goes out to your client and which responses get posted online. Let your best clients do your marketing by posting happy reviews on their third-party accounts and social networks. This program will automatically generate social media graphics with client testimonials for you to share on your social media channels.

With custom surveys, you can improve operations and customer satisfaction and gain insight into what matters most to your customers.





# YOUR SUCCESS IS OUR PRIMARY GOAL

Coldwell Banker Hearthside is committed to helping all our agents, regardless of their experience, achieve success. One of our primary focuses is to support our agents in expanding their spheres of influence through the business opportunities provided to them by Sky Leads and Blue Sky Leads.

Our agents have access to programs and platforms that we have deemed valuable and decided to partner with. There is a lead source, or a few sources, for each of our agents. Sky Leads and Blue Sky Leads consistently add new partners and help our agents learn how to succeed in this business segment.

## HEARTHSIDE RELOCATION

Coldwell Banker Hearthside is deeply involved in the relocation industry at every level, with active memberships and participation in local, national, and global organizations, such as the Worldwide Employee Relocation Council and the Philadelphia Area Relocation Council. Involvement in these organizations, combined with our company culture, ensures that our knowledge and expertise evolve with the ever-changing industry.

Coldwell Banker Hearthside has achieved top performance awards supporting the Relocation Industry for 18 years. The largest and most successful Relocation Companies invite us to help their transferring employees.

We partner with virtually every relocation company that manages moves for transferring employees, including the Federal Government, Fortune 500, and Fortune 100 Companies around the globe.

Ultimately, our industry partnerships and decades of experience bring additional value to agents at every stage of their careers.





# **JUST A FEW OF THE THINGS OUR AGENTS LOVE ABOUT COLDWELL BANKER HEARTHSTONE**

**"The Coldwell Banker Hearthstone support staff is great! They are a wealth of knowledge. The owners are always available to answer any questions or take suggestions."**

Scott Freeman - CBH Ottsville

**"The company is simply top-shelf! From the support you are given as an agent to the way you are celebrated for your success, I could not ask for anything more."**

Bud Sperber, Huntingdon Valley

**"Coldwell Banker Hearthstone allows me to do my job. In terms of marketing and social media, it allows me to represent my clients at the highest level."**

Jacqueline Hillgrube, CBH Newtown

**"The training and support staff at Coldwell Banker Hearthstone are amazing. It is a great place to work."**

Laura Miller - CBH Lahaska

**"My business has increased since moving to Coldwell Banker Hearthstone, and I feel heard. I can call the CEO, and he actually answers the phone and is willing to walk me through a problem or get me the help I need."**

Keith Kline - CBH Collegeville

**"We are so happy we made the switch to CBH. Our business has grown, we have made some incredible connections, and forged lifelong friendships. We tell everyone to come here!"**

Concetta and Anthony Stefani - CBH Newtown

**"I call this the brokerage with heart."**

Metro Jones - CBH Lansdale





**THE NUMBERS ARE IN.  
NOBODY BEATS THE  
COLDWELL BANKER® BRAND.**

# #1 IN AGENT LOYALTY

Coldwell Banker/Quester Real Estate Agent Research. January 2024. Least Likely to Change Brand Affiliation.

## WOMEN'S CHOICE AWARD® WINNER 7 YEARS IN A ROW

### AGENTS THAT UTILIZED PRODUCTS WITHIN OUR TECHNOLOGY SUITE WERE 3.3X MORE PRODUCTIVE

Based on the production of agents that performed an action in at least one of the following products in our technology suite between Jan 1, 2023 and Dec 31, 2023: Prospect Square, Listing Concierge, Design Concierge, Boost, Exclusive Look, Market Quest, MoxiPresent, MoxiEngage, and MoxiImpress. Results are not guaranteed.

# 100,0000

AGENTS ACROSS 40 COUNTRIES

As of 12/31/2023

# #1

RATED REAL ESTATE  
ADVERTISING 12 YEARS  
RUNNING

ACE Metrix scores 2012-2023. Real Estate Category

# 118 YEARS

OF GUIDING PEOPLE HOME

## \$1.6 MILLION

DONATED TO ST. JUDE  
CHILDREN'S RESEARCH  
HOSPITAL®

Since program inception in 2020

# #1

MOST VISITED  
REAL ESTATE  
BRAND ONLINE

- Reflects total website visits or 2023. Source: Comscore 2023 Media Trends

## 481,548

US TRANSACTION  
SIDES

Year-End Coldwell Banker Numbers Based on  
Coldwell Banker Financial Data as of 12/31/2023

## \$234 BILLION

IN SALES VOLUME

OVER 

## \$200 MILLION

  
IN DAILY LUXURY SALES

Data based on closed and recorded buyer and/or seller transaction sides of  
homes sold for \$1 million or more as reported by affiliates of the U.S. Coldwell  
Banker franchise system for the calendar year of 2023. USD\$.

## HALF A BILLION

MEDIA IMPRESSIONS IN 2023

- 2023 Sprout Social and Media Agency Reporting









**COLDWELL BANKER**  
**HEARTHSIDE**

## **THE GLOBAL STANDARD IN LUXURY REAL ESTATE**

Our affiliated agents are a remarkable force in the arena of high-end real estate, transacting over \$200 million in daily luxury sales in 2023, with over 39,000 transactions of \$1 million+ properties. We're also proud to be a leader in the ultra-luxury space, having closed more than 280 transactions over \$10 million last year.

With our global network of high-networth clientele and highly prestigious properties, experienced luxury agents and brokers can be confident that there's no better home for their business than with the Coldwell Banker Global Luxury® program.



# COLDWELL BANKER GLOBAL LUXURY® CERTIFICATION

Coldwell Banker Global Luxury® Certification For agents seeking to develop and enhance their luxury skillset, a Coldwell Banker Global Luxury® certification is a fantastic way to open new doors. Presented by the esteemed Coldwell Banker Global Luxury Ambassadors in association with the Institute for Luxury Home Marketing®, the course is designed to help affiliated agents win luxury listings, market luxury properties and grow your business. Affiliated agents with Luxury Property Specialist Certification sell properties with a \$200K higher average sales price<sup>1</sup>.

Upon completion of the luxury certification course, agents can gain two esteemed designations: Luxury Property Specialist (LPS) and Certified Luxury Home Marketing Specialist (CLHMS). Additional luxury mentorship and prestigious speaker series are invaluable occasions to learn firsthand from some of the industry's most successful figures.

**ON AVERAGE,  
COLDWELL BANKER®  
AFFILIATED AGENTS  
TRANSACT OVER \$200  
MILLION IN DAILY  
LUXURY SALES.**







# WORLD-CLASS LUXURY MARKETING

You will be supported by the Coldwell Banker Global Luxury program. Enjoy expansive online syndication on high-traffic websites such as The Wall Street Journal, Robb Report, Mansion Global, MarketWatch, Penta, Barron's, and Unique Homes. As well as international syndication through ListHub Global and James Edition.

We create real influence through dedicated platforms like the elegant [coldwellbankerluxury.com](http://coldwellbankerluxury.com) website, Homes & Estates magazine, custom editorial articles via the Curated newsletter, featured content and real estate updates via the Coldwell Banker Global Luxury blog site, and industry-leading market reports.

We're constantly looking for new ways to increase networking opportunities for our Global Luxury Property Specialists through exclusive events, both in-person and virtually.

Bespoke marketing assets, an array of print and digital advertising opportunities, and a refined identity empower agents even amidst the most intense competition. This is luxury real estate with the power of the Coldwell Banker® brand.







# CREATE A STRONG FOUNDATION FOR YOUR FINANCIAL HEALTH.

## REFERRAL REWARDS

Unlock unlimited earning potential and generate a passive commission stream by introducing other productive agents to the Coldwell Banker® brand. When you refer a qualifying agent who joins our network, you'll receive a Referral Rewards Commission Payment on their eligible closed transactions, with no cap or limits on how much you can earn or how many agents you can refer. Discover amazing passive commission earning potential as part of the Coldwell Banker brand.

Agents are telling other agents about the value Coldwell Banker is bringing to their business – in fact, more than 38% of agents who affiliated with a Coldwell Banker company in 2023 were referred by another Coldwell Banker agent through this program

## BENEFIT OPPORTUNITIES (SPARK)

We offer access to health, savings/retirement, identity theft protection, legal services, and other personal lifestyle options designed to help you grow your business and balance your life. SPARK is available to all Coldwell Banker-affiliated agents. It's a membership association providing access to exclusive products and services tailored to your needs, including health, dental, disability, and vision insurance; retirement savings accounts; cyber security compliance and protection; discount business services; and discounted CE and license renewal.

## STRATEGIC PARTNERSHIPS

Coldwell Banker has even created partnerships with many strategic alliances that can further help your business thrive. Through the Coldwell Banker Business Advantage<sup>SM</sup> Program, you can access exclusive savings and perks with dozens of vendors that provide tools and services to support your daily business needs. Our Business Advantage partners cover various areas, including real estate software, moving and home services, print and visual marketing, back office suppliers, and more.







# FIND YOUR PLACE IN THE COLDWELL BANKER COMMUNITY.

## CELEBRATING OUR PEOPLE

The Generation Blue Experience® is a gathering unlike any other. Here, thousands of affiliated agents come together to share knowledge, have fun and get fired up to be the best. Whether united virtually from every corner of the globe, or brought together in the most prestigious venues of amazing cities like Los Angeles, Miami, Las Vegas, Chicago, New York and Atlanta, we gather to celebrate who we are and what we can become.

Incredible speakers share knowledge, insight and wisdom. Informative classes teach new skills and the latest technology. Dozens of business-building vendors are there to connect with you. Amazing social events featuring some of the world's top entertainers allow agents to connect professionally as colleagues and personally as friends - many times, creating friendships that last a lifetime.

At the Generation Blue Experience, it's easy to see that being part of the Coldwell Banker brand means being part of something truly special. There's a powerful spirit that runs through the Gen Blue community, through every agent, office, and broker. We wake up inspired. Inspired to have fun. Inspired to care. Inspired to be an indispensable part of our neighborhoods. Inspired to create something amazing for our clients and our business. Across 45 countries and with over 96,000 people, we are united by our passion, our joy, and our desire to achieve great things in real estate.

## DOING GOOD LOCALLY AND GLOBALLY

Ethics played a crucial role in differentiating Coldwell Banker from other real estate companies at the time of our founding, and they are at the core of who we are to this day. Our ethics are a big part of the reason why we're #1 in agent loyalty. We're also passionate about supporting the communities where we live, work and play. The Coldwell Banker brand facilitates inspiring organization-wide charitable programs like the CB Supports St. Jude program.

We're incredibly proud that many local offices generously support amazing local nonprofits in their region, too, donating over \$32 million since 2012. What's more, our parent company, Anywhere Real Estate Inc., has been named one of the World's Most Ethical Companies® for over a decade by the Ethisphere Institute, which recognizes organizations that continuously raise the bar on ethical leadership and corporate standards.





# SUPPORTING DIVERSITY AND INCLUSION AT THE COLDWELL BANKER BRAND.

The Coldwell Banker brand has long been committed to being a leader in diversity and inclusion, not just in the real estate industry but globally. We're proud to be a company where people of diverse backgrounds and experiences succeed and grow together.

## **Inclusive Ownership Program**

The Inclusive Ownership Program, an industry-first initiative, is designed for the important purpose of increasing the presence and power of underrepresented communities within the real estate industry. The program waives the initial franchise fee on the Main Office for people of color, women, LGBTQ+ people, and veterans, and provides up to \$100k in financial incentives\* such as discounted tuition on CB Brand leadership experiences and business support to help these entrepreneurs thrive. All of this is combined with a year-long, one-on-one mentoring program with our senior executives. Since its debut in 2020, we've welcomed 34 companies to the Coldwell Banker community through the Inclusive Ownership Program.

## **Fair Housing for All**

Our affiliated agents are proud to take the Fair Housing Pledge, a commitment to providing every client, regardless of race, gender, or orientation, the same level of respect and excellence. What's more, the Coldwell Banker brand has reimaged our Fair Housing Act workbook, making it one of the most current and comprehensive guides in understanding and abiding by this legislation.

## **Empowering Women**

The Coldwell Banker brand is deeply invested in fostering leadership and entrepreneurship opportunities for women. We host informative, fun, and inspiring events like our What Moves Her® series, championing the perspectives and talent of women in real estate. We're honored to be a winner of the Women's Choice Award® for seven years in a row—a recognition designated by 9 out of 10 female customers who highly recommend the brand.

## **A Network of Belonging**

We're deeply committed to our partnerships with industry associations like NAHREP®, NAREB®, AREAA, and the LGBTQ+ Real Estate Alliance that represent and support agents from diverse backgrounds. Our Agents of Change Mastermind events are another powerful opportunity for Coldwell Banker-affiliated agents to network and learn together while celebrating diversity.





# THE TOP-RATED MARKETING IN REAL ESTATE, 12 YEARS RUNNING.

When you join the Coldwell Banker® network, your business benefits from being a part of a marketing powerhouse. From the national level, where our advertising has been the #1 rated real estate ad for 12 years in a row, to client outreach pieces customized just for you, discover what happens when you're supported by the best marketing anywhere.

## **Beautiful Marketing Made Simple**

You can present your business at every touchpoint with engaging marketing pieces and elegant design. Your business can take full advantage of our market presence and professional branding via a library of beautiful imagery, video, and graphics. We make it seamless to customize your marketing materials across social media, websites, email marketing, video, and more.

## **Benefit from National Advertising**

Our award-winning commercials appear across media where home buyers and sellers spend the most time, making for brand recognition and influence of the highest tier—consumers who watched our advertising were nearly 4x as likely to work with a Coldwell Banker affiliated agent. Our advertising campaigns are a rallying point for the network and a great occasion for client outreach. In addition to powerful national advertising, our agents benefit from brand-led search engine marketing and social media lead generation for every listing on coldwellbanker.com, at no additional cost.

## **Experience Powerful PR**

The Coldwell Banker brand is a newsmaker in the real estate industry, earning over 37,000 media hits in 2023. And we averaged 104 media mentions, touching 3.3 million consumers daily, equating to 31.6 billion consumers reached. Our leadership team and network of agents are consistently called upon by the likes of WSJ, NYT, Yahoo Finance, Robb Report, Fast Company, Forbes, and CBS News as the authoritative voice in real estate.

## **Reach Home Sellers Like Never Before**

Winning the listing has never been more important and more of a challenge. That's why we've created highly useful and powerful new web experiences for home sellers that can be harnessed to benefit your business. With our instant home estimate tool, CB Estimate®, and our industry-exclusive Move Meter®—a big data tool that compares the quality of life and cost of living city-by-city and is deemed the most useful tool in the real estate industry—we empower people to see the advantages of selling.







**COLDWELL BANKER**  
**HEARTHSIDES**



## TOOLS AND SERVICES

Discover why Coldwell Banker Hearthsides technology and services are second to none. These cutting-edge and easy-to-use tools help you generate more leads, automate your marketing and make your business more efficient

### NOT SURE WHERE TO START?

#### 3 IMPORTANT THINGS WE RECOMMEND TO OUR NEW AGENTS

- 1 Training | Onboard Training
- 2 Business Builder | Weekly Accountability sessions in your office
- 3 Building Your Database | BlueEdge newsletter, 3 calls per day to SOI, drip email campaigns

#### 3 IMPORTANT THINGS WE RECOMMEND TO OUR EXPERIENCED AGENTS

- 1 Business Plan | Meet with leadership to discuss your business plan and design your coaching program
- 2 Branding and Announcing | Sit down with our Marketing team to create move announcements, branding, & marketing materials
- 3 Tech Startup | Meet with IT Department and set up zipForm, printers, eSign, moving your database, and more





## GOALS

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WHAT CAN WE DO FOR  
YOU? WHAT DO YOU NEED  
TO ACHIEVE YOUR GOALS?

## ROADBLOCKS

What will prevent you from reaching your goals?

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# CHECK BELOW IF YOU ARE INTERESTED IN LEARNING MORE

INTERESTED

IN PROGRESS

COMPLETED

## CBDESK

With Desk, you only need one login to access all the products and programs the Coldwell Banker brand offers. And it combines everything you love about an intranet, news sites, and search engine into one easy-to-use application.

☐☐☐

## EXCLUSIVE LOOK

You can leverage the strength of your Coldwell Banker network and promote your listing before it goes live on the market. Affiliated agents and teams who used Exclusive Look earned \$59.5K more.

☐☐☐

## MARKETING CENTER

Save time and easily create beautiful materials in minutes. Automate your marketing and stylishly promote yourself and your listings with customizable videos, social assets, and print integration.

☐☐☐

## BOOST

Easily advertise your business and properties on social media and other digital platforms.

☐☐☐

## MOXIPRESENT®

MoxiPresent creates sleek, customizable, showstopping CMAs, luxury presentations, open house flyers, and neighborhood tours. Affiliated agents and teams who used MoxiPresent to create a seller presentation had 1.5 X more list-side units.

☐☐☐

## MOXIENGAGE®

MoxiEngage is a powerful CRM and business planner that allows you to manage your entire book of business, create marketing campaigns, set your sales goals, and get data-driven insights to help you achieve them.

☐☐☐

## MOXIWEBSITES™

MoxiWebsites allows you (or your team) to create a professional, custom website in minutes with an easy-to-use and versatile content management system and collection of branded webpage templates.

☐☐☐

## MOXIIMPRESS™

MoxiImpress helps you promote your listings by allowing you to automatically create and distribute print, digital and social media advertising materials in a matter of minutes.

☐☐☐



INTERESTED      IN PROGRESS      COMPLETED

#### LISTTRAC

ListTrac provides online activity reporting for your listed properties. You can keep a pulse on the performance of their listings with metrics including listing views, leads, shares, and favorites captured from major portals, broker sites, and MLS systems, and keep your sellers informed with a weekly report showing how their listing is performing online.

☐☐☐

## GET GAME-CHANGING MARKETING SERVICES

#### BLUEEDGE MARKETING

BlueEdge was designed exclusively to help you grow your real estate business. Our program aims to provide agents and brokers with tools, resources, and strategies to market properties and attract potential buyers and sellers. It may involve direct mail, online and offline marketing, advertising, and promotional activities.

☐☐☐

## PROSPECTING TOOLS

#### PROSPECT SQUARE

Stay in touch with your contacts with automated, customizable reports and an e-marketing center. Affiliated agents and teams who used Prospect Square earned \$64K more.

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#### MARKET REPORTS

You can share the latest market data and trends through Prospect Square to showcase your expertise with three customizable, automatic reports: Market, Area, and Quarterly Reports. Affiliated agents and teams who used Prospect Square earned \$64K more and are 1.7 X more productive.

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#### MARKET SHARE REPORTS

You can use these quarterly reports in listing presentations or send them to your sphere to show the counties, cities, and ZIP codes where the company is #1 in sales volume or closed units.

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#### BLUEEDGE SOCIAL MEDIA

Instagram, Facebook, YouTube, LinkedIn, Twitter...wherever your audience spends their time, they'll see you! Automated, expertly-crafted real estate content and marketing or advertising your listings.

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# GROW YOUR SKILLS AND BUSINESS WITH EXCEPTIONAL EDUCATION

INTERESTED

IN PROGRESS

COMPLETED

## HEARTHSIDE EDUCATION

From setting goals to leveraging your resources, winning listings, to negotiating transactions, the skills taught will help propel you to higher productivity and a more prosperous future. Weekly training sessions include CBH Sales and Tools Training, Marketing & Tech Tools, Business Builder, and CBH Sponsored Continuing Education For License Renewal.

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## CBU LEARNING CENTER

Affiliated agents who took CBU Learning courses displayed more significant improvement in their business during the 12 months following their coursework than in the 12 months prior. The average gain over the prior 12-month period was 33% for closed volume and 11% for closed units. Discover robust in-person and virtual programs to help you throughout your career, covering topics like maximized productivity, negotiating skills, listing presentations, team-building, and more.

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## LUXURY PROPERTY SPECIALIST CERTIFICATION

This powerful and elite course provides the foundation for a successful career representing exceptional properties and an affluent clientele. It's a remarkable opportunity to learn from top luxury specialists at the Coldwell Banker brand and superstar agents across the industry. Certified Luxury Property Specialists sell properties with a \$200,000 higher average sales price.

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## SALES AND BUSINESS COACHING

We offer learning opportunities for individual and team-building success, provided by internal and external coaches who know our systems and programs.

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# WEALTH BUILDER

## REFERRAL REWARDS

Unlock unlimited earning potential and generate a passive income stream by introducing other productive agents to the Coldwell Banker® brand. When you refer an agent who joins our network, you'll receive a Referral Rewards Commission Payment on their eligible closed transactions, with no cap or limits on how much you can earn or how many agents you can refer. Discover amazing passive income earning potential as part of the Coldwell Banker brand.

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	INTERESTED	IN PROGRESS	COMPLETED
<p><b>BENEFIT OPPORTUNITIES (SPARK)</b></p> <p>We offer access to health, savings/retirement, identity-theft protection, legal services, and other personal lifestyle options designed to help you grow your business and balance your life. This includes SPARK, available to all Coldwell Banker affiliated agents. SPARK is a membership association providing access to exclusive products and services tailored to your needs, including health, dental, disability, and vision insurance; retirement savings accounts; cyber security compliance and protection; discount business services and discounted CE and license renewal.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>HEARTHSIDE TOOLS AND SERVICES</b></p>			
<p><b>SKY SETTLEMENT SERVICES CERTIFIED</b></p> <p>This program is intended to give Coldwell Banker Hearthside agents and their sellers peace of mind on every listing transaction. Sky Settlement Services completes a detailed property analysis and gets the information needed for a seamless and timely closing. We know what is required to close.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>CONNECT CLOSING</b></p> <p>Your next Transaction Assistant! We treat every transaction with the utmost care and concern. Your Transaction Coordinator will manage all of the administrative paperwork and deadlines involved in your real estate transaction from contract to close and everything in between. We have both buyer and seller packages.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>HOUSE OF HEARTHSIDE</b></p> <p>Our all-company communication platform with a document library, company announcements, and more</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>TESTIMONIAL TREE</b></p> <p>A software tool that makes it easy for you to collect authentic testimonials from your happy customers and automatically share their stories online to attract new ones.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>ZIPFORMS AND ESIGN</b></p> <p>All of the forms you need are in one place - PAR, CBH, and more. Plus templates and built-in eSign. Everything you need to get business done.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>SHOWINGTIME</b></p> <p>A management tool that enhances your productivity and organizes your appointments for showings. Easily schedule &amp; confirm showings all in one application.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



# A WORLD-CLASS TECHNOLOGY SUITE

We provide business-building products so your brokerage can sell more homes, make more money and work more efficiently. Agents and teams that utilized products within our technology suite were 3X more productive.

	Coldwell Banker Value	Market Value
<b>Desk</b> Our intranet site is your one-stop-shop to access all company products, programs, and news.	Included	Varies
<b>Database Management and Email Marketing Solutions (Prospect Square, MoxiEngage®)</b> Prospect Square helps agents deliver automated reports and campaigns so they can stay top of mind with their sphere. MoxiEngage® is a powerful CRM and business planner which allows you to manage your entire book of business, create marketing campaigns, set your sales goals, and get data-driven insights that help you achieve them.	Prospect Square Included (MLS subscription required) MoxiEngage Included	\$1,995/year
<b>Company and Agent Websites (MoxiWebsites®)</b> This easy-to-use website builder for brokerage, team, and agent websites makes putting your brand's best foot forward a simple task. MoxiWebsites comes with Yoast SEO plugged in to guide you to optimize every page of your site for great search results.	Included	Moxi Platform \$6,625/year
<b>Digital Presentations and CMA Tool (MoxiPresent®)</b> MoxiPresent creates sleek, customizable, showstopping CMAs, luxury presentations, open house flyers, and neighborhood tours.	Included	Moxi Platform
<b>Property Marketing Programs (MoxiImpress®, and Exclusive Look)</b> MoxiImpress helps you promote your listings by allowing you to automatically create and distribute print, digital and social media advertising materials in a matter of minutes. Exclusive Look empowers agents to share listings with other Coldwell Banker-affiliated agents even before the property is submitted to the MLS.	Included	Moxi Platform
<b>Digital Brand Asset Creator (Marketing Center)</b> Marketing Center is a digital content management solution and asset generator that gives affiliated agents and brokers the ability to download company and brand logos, access brand photography, customize and post personalized social media assets, create and print marketing materials, customize national advertising campaigns, and more.	Included	\$1,440/year
<b>Targeted Digital Advertising (Boost)</b> Boost, powered by Lone Wolf automates targeted digital advertising campaigns, allowing agents to create ads that promote them and their listings in minutes. Ads run on Facebook, Instagram, the Nextdoor app, and over 1,000 websites.	Platform included + \$99/mo (agent promotion) \$39/week (per listing ad)	Platform varies





**COLDWELL BANKER**

**HEARTHSIDE**

**SALES AGENT EXPENSES**

## STATE REAL ESTATE COMMISSION FEES

### PA Real Estate Commission

Initial Licensing - includes background check  
conducted by State: \$129.00  
Transfer of Existing License: FREE

### NJ Real Estate Commission

Initial Licensing: \$160.00  
Transfer of Existing License: FREE

## BUCKS, MONTCO, DELAWARE, AND PHIL. ASSOCIATIONS & MLS FEES

### Bucks County Association of REALTORS (BCAR)

Application Fee: FREE  
Annual Dues: \$614.00  
PAR New Member Fee: \$125.00

### Tri-County Suburban Realtors

#### (Montgomery/Chester/Delaware Counties)

Application Fee: \$150.00  
Annual Dues: \$538.00  
PAR New Member Fee: \$125.00

### Greater Philadelphia Association of Realtors (GPAR)

New Realtor Initiation Fee: \$60.00  
Annual Member Dues: \$649.00  
PAR Member Fee: \$125.00

### BrightMLS

Application Fee: \$250.00  
Quarterly Dues (shareholder): \$120.00

## LEHIGH VALLEY ASSOCIATION & MLS FEES

### Greater Lehigh Valley Association & MLS (GLVAR)

New Member Association Fee: \$250.00  
MLS New Member Fee: \$225.00  
PAR New Member Fee: \$125.00

Annual Board Dues: \$524.00  
Quarterly MLS Member Fee: \$110.00

## NJ ASSOCIATION & MLS FEES

### Mid-Jersey

#### (Hunterdon/Mercer/Somerset Counties, NJ)

Application Fee: \$50.00  
Yearly Membership Dues: \$501.00  
Garden State MLS (GSMLS)  
Bi-annual Member MLS Fee: \$87.50

## POCONO ASSOCIATION & MLS FEES

### PMAR

Application Fee: \$125  
Yearly Membership Dues: \$484

### FLEX MLS

Application fee: \$200  
Quarterly Fee: \$145  
Primary Realtor: \$484 Annually + \$125 One-Time Fee  
MLS for Members: \$145 Quarterly + \$200 One-Time Fee

## HEARTHSIDE ERRORS AND OMISSIONS INSURANCE

### Errors and Omissions Insurance (\$2,500 deductible): \$600.00

Prorated from the start date to end of policy year (September)

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**COLDWELL BANKER**  

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**HEARTHSIDE**

[CBHRE.COM](http://CBHRE.COM)