

Assistant / Transaction Coordinator Disclosure and Consumer Acknowledgment

DRAFT FOR BROKER / ATTORNEY REVIEW

Purpose of this disclosure. This form is intended to identify any licensed or unlicensed assistant, administrative assistant, or transaction coordinator who may assist with this transaction; explain the limits of that person's role; disclose whether the person is licensed and/or sponsored by the same broker; and obtain the consumer's acknowledgment that transaction information may be shared as described below. This form does not replace the Information About Brokerage Services form, a representation agreement, a listing agreement, a buyer representation agreement, or any contract addendum required by law or by the parties.

1. TRANSACTION AND PARTIES

PROPERTY / TRANSACTION ADDRESS	CLIENT / CONSUMER NAME(S)
REPRESENTED PARTY ☐ Buyer / Tenant ☐ Seller / Landlord ☐ Other: _____	RESPONSIBLE AGENT / LICENSE HOLDER License No.: _____ Brokerage: _____

2. DEFINITIONS

TERM	MEANING FOR THIS DISCLOSURE
Licensed Assistant	A person who holds an active Texas real estate license and assists with transaction-related tasks. A licensed assistant may perform licensed real estate activity only as permitted by Texas law, TREC rules, the assistant's sponsoring broker, and any brokerage policies or written authority in place for the transaction.
Unlicensed Assistant	A person who does not hold an active Texas real estate license. An unlicensed assistant may perform administrative, clerical, scheduling, document-handling, and file-support tasks, but may not perform activities requiring a real estate license.
Transaction Coordinator	A person or service that helps organize transaction paperwork, deadlines, signatures, communications, and file completion. A transaction coordinator may be licensed or unlicensed. The title alone does not determine what the person may do; license status, sponsorship, broker authorization, and Texas law control the permitted scope.

3. ASSISTANT / COORDINATOR IDENTIFICATION

NAME OF ASSISTANT / COORDINATOR	COMPANY / SERVICE NAME, IF ANY	PHONE / EMAIL
LICENSE STATUS ☐ Licensed assistant / licensed transaction coordinator ☐ Unlicensed assistant / unlicensed transaction coordinator	BROKERAGE RELATIONSHIP ☐ Works under / is sponsored by the same broker as the responsible agent ☐ Does not work under / is not sponsored by the same broker as the responsible agent ☐ Third-party administrative or transaction coordination service	
IF LICENSED: TEXAS LICENSE NO.	IF LICENSED: SPONSORING BROKER	BROKER LICENSE NO.

4. ROLE LIMITS: WHAT MAY AND MAY NOT BE DONE

ADMINISTRATIVE / SUPPORT TASKS THAT MAY BE ALLOWED	ACTIVITIES NOT ALLOWED FOR AN UNLICENSED ASSISTANT
- Schedule appointments, inspections, repairs, closings, and document-signing logistics. - Collect, send, receive, upload, organize, and track transaction documents as directed by a license holder. - Provide status updates, deadline reminders, and file-completion requests. - Input information or type documents only as specifically directed by a license holder. - Confirm information already advertised or already included in transaction documents, when appropriate.	- Negotiate, solicit, or discuss purchase, sale, lease, price, commission, compensation, repair, or contract terms. - Give advice or opinions about offers, counteroffers, amendments, addenda, disclosures, financing, inspections, repairs, title, or closing issues. - Interpret the legal effect of contracts, addenda, amendments, notices, disclosures, or other transaction documents. - Show property, unlock property, provide access to property, or host an open house. - Hold themselves out as representing a consumer as a broker, sales agent, or authorized license holder.

Licensed assistant note: A licensed assistant may perform licensed real estate activities only if properly licensed, sponsored, and authorized. If the licensed assistant is not sponsored by the same broker as the responsible agent, this disclosure does not create representation, agency, intermediary status, or authorization to provide brokerage services on behalf of another broker unless separately permitted in writing and by law.

5. TRANSACTION INFORMATION AND COMMUNICATION DISCLOSURE

The consumer is advised that the assistant / coordinator identified above may receive, view, transmit, upload, organize, or help track transaction-related information and communications for administrative transaction support.

This may include, but is not limited to: contracts, amendments, addenda, notices, disclosures, seller documents, buyer documents, prequalification or preapproval letters, proof-of-funds documents, inspection documents, repair-related documents, title or closing documents, lender communications, transaction deadlines, signatures, contact information, and communications between or among the consumer, responsible agent, broker, brokerage, lender, title company, inspector, cooperating broker or agent, and other transaction participants.

The assistant / coordinator may communicate with transaction participants for administrative purposes, including scheduling, document collection, signature coordination, status updates, deadline reminders, file-completion requests, and closing coordination. Any request for real estate advice, negotiation, interpretation, or a decision affecting the transaction should be referred to the responsible license holder or broker.

6. FEE DISCLOSURE

ADMINISTRATIVE / TRANSACTION COORDINATION FEE

- ☐ No separate assistant / transaction coordination fee is being charged to the consumer.
- ☐ Fee is paid by the responsible agent.
- ☐ Fee is paid by the broker / brokerage.
- ☐ Fee is charged to the consumer / client as disclosed below.

FEE AMOUNT

\$ _____

WHEN DUE / HOW COLLECTED

ADDITIONAL FEE NOTES

A fee paid to an unlicensed person is for administrative support only and is not compensation for performing licensed real estate brokerage activity. Any consumer-paid fee should also be disclosed in the applicable representation agreement, listing agreement, contract, settlement statement, or other required documentation as appropriate.

7. CONSUMER ACKNOWLEDGMENT / NON-ACKNOWLEDGMENT

- ☐ I acknowledge receipt of this disclosure and understand that the assistant / coordinator identified above may receive, view, transmit, and communicate about transaction information as described for administrative transaction support.
- ☐ I acknowledge receipt of this disclosure but do not consent to voluntary sharing of my transaction information with the assistant / coordinator beyond what is otherwise required or authorized by law, contract, broker policy, or transaction necessity.
- ☐ I decline to sign / acknowledge this disclosure. Reason, if any: _____

CONSUMER SIGNATURE

DATE

CONSUMER SIGNATURE

DATE

8. RESPONSIBLE LICENSE HOLDER / BROKERAGE CONFIRMATION

RESPONSIBLE LICENSE HOLDER

LICENSE NO.

BROKERAGE

LICENSE HOLDER SIGNATURE

DATE

BROKER / SUPERVISOR, IF REQUIRED

DATE