

# Cornerstone

## Association of REALTORS®

### REAL ESTATE SAFETY GUIDE: HELPFUL TIPS & CHECKLISTS

Being a real estate professional is an exciting, rewarding, and challenging career. Just like any job, a career in real estate comes with its own set of risks. That doesn't mean you should live in constant fear...but there are steps you can take to ensure your own personal safety, as well as the safety of your clients and their property.

This booklet has been developed as a resource for members of the Cornerstone Association of REALTORS® (Cornerstone) with content developed both internally, as well as curated from the National Association of REALTORS® Safety program.

***Please Note: The information provided in this booklet is for information purposes only and is not legal advice or a substitute for legal counsel.***

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- ☐ Listen and trust your intuition
- ☐ Partner with a safety buddy
- ☐ Keep work life and personal life separate
- ☐ Always have your cellphone ON you
- ☐ Always drive your own vehicle
- ☐ Park at the curb so your car cannot be blocked
- ☐ Determine how to handle verbally abusive clients and/or colleagues in advance
- ☐ Be aware of risky situations, constantly evaluate situations to determine the risk
  - Ex. Power of sale listings in which the previous owners may be upset about the home being sold
- ☐ Provide safety materials to clients
- ☐ Avoid wearing expensive jewelry or other signs of wealth
  - Of course this is often difficult if not impossible with social media and marketing, so be aware of how you may be perceived by a predator (i.e. "rich")
- ☐ Be aware of traffic
- ☐ Be aware of any programs offered by your office
- ☐ In the case of a incident, always ensure your own safety first, then others, then contact police
- ☐ Consider taking a course in self-defense



- ☐ Use strong body language
  - Walk with confidence, keep your head up, pay attention to what's going on around you, instead of your phone or papers
- ☐ Attend member open houses
  - Become familiar with properties prior to showing them
  - Become familiar with neighbourhoods prior to showing homes there
  - Be aware of locations of Police Stations
  - Know where you can find help if needed
- ☐ Be in the habit of always planning an escape route
- ☐ Control your surroundings
  - Be cautious when doing "favours" for colleagues that may put you in an unfamiliar situation i.e. Opening an unfamiliar home for a final walk through in a strange house/neighbourhood
- ☐ Immediately leave a property and contact police if you believe a crime has/is being committed (theft, vandalism, grow op, squatters, etc.)
- ☐ Do not confront anyone you believe is in the process of a crime unless you or someone else is in immediate danger
- ☐ Carry a high intensity, tactical flashlight

## ID Your Clients



- ❑ Inform client: The office policy requires you to meet prior any showings or listings
  - Never consume alcohol, mix personal and professional life
- ❑ Confirm the identity of who you are working with as soon as possible
  - Use the FINTRAC requirements to explain why you need to verify their ID
  - Google their name prior to meeting
  - Store their identity in a safe place where others have access to if needed (and let them know)
  - Confirm your client matches their ID
  - Ideally include an image of your client, especially if one is not part of their ID
    - Install CCTV at your office
  - If meeting them at their home, search GeoWarehouse to confirm ownership
- ❑ Some methods of contact will require more effort to identify the client
  - Online contact
  - Phone contact
    - Blocked
    - caller ID can be a concern, ask for their number to call them back
    - Reverse phone number look up
  - In person
    - Government issued photo ID

# Showings



- ☐ Only show properties to clients you have positively identified
  - Ask all prospects to fill out a customer identification form and provide ID (photograph or photocopy the prospect's driver's license if you deem necessary)
- ☐ Familiarize yourself with the home/neighbourhood in advance
  - Assess the value and risk of the property you are showing and then decide whether or not you take another agent or friend with you
  - Look for exits and potential obstacles
- ☐ Park your car at the curb in front of the property to avoid being blocked
- ☐ Call or text your office to let them know you have arrived, where you are, and with whom
- ☐ Dress in professional business attire, but make sure your shoes are comfortable enough to possibly run in
- ☐ While showing a property
  - Let your client lead
    - Avoid having your back to someone
  - Don't carry too many things; Try to always keep at least one hand free
  - Stay close to entrances
  - Avoid going into isolated areas or "dead-end" rooms such as cellars, attics and walk-in closets
- ☐ Bring a colleague to showings with you
  - Can be a mentoring experience to new members
- ☐ Keep all showings during reasonable times



## Open Houses

- ☐ State in advertisements that identification will be required, and surveillance will be in use
- ☐ Identify everyone who attends your open house
  - Use a sign in sheet
  - Capture ID on camera
  - Livestream attendees as they enter
- ☐ Park at the curb so your car cannot be blocked
- ☐ Leave your purse secured/in your vehicle (trunk)
- ☐ Arrive early and keep the doors locked until you are ready to open them
- ☐ Walk through the home
  - Ensure no personal information of client is accessible
  - Look for mail, envelopes, personal photos, etc
  - Ensure pets are managed appropriately
  - Check that valuables are secured
  - Position webcams, start up surveillance app if applicable
- ☐ Control the entry points
  - Limit access to what you can manage
  - Beware of back doors, garages, back yards, etc.
  - There is no obligation to let anyone into any open house
  - Review...plan an escape route
- ☐ Check the outside for escape route obstacles such as fences, shrubbery, ponds
- ☐ Keep a hand free; carry only non-valuable business items, make sure your car keys and phone are always on your person
- ☐ Connect with the neighbours in advance of the open house
  - Let them know day/time of open house and ask them to alert you of any potential suspicious activity
  - Let them know you'll do your best to ensure attendees park appropriately, respect their property
- ☐ Do not allow visitors to enter before you have completed your safety checks
- ☐ Provide effective staffing
  - Ask a friend or colleague to sit the open house or model home with you

- Use the open house as an opportunity for mentoring newer members
  - Consider hiring a security officer for the open-house event, if the value of the home is high-risk
  - Beware of couples or groups who split up
- ❑ Consider briefer open houses to avoid quiet times at the end of the day
- ❑ Secure the home at the conclusion
  - Lock the front door to ensure no one comes in while you are checking
  - Call a safety buddy and keep them on the phone while you are walking through the home and until you are safely in your car
- ❑ Have someone available to meet you/walk you to your car if you see anyone loitering outside
  - If safe to do so, take their picture and send it to your safety buddy
  - If unsure, stay in the house with locked doors
- ❑ Limit the number of people in the home at one time



## New Listing Appointments

- ☐ ID your clients *(see section on this topic)*
- ☐ Ask how the seller found your company and you
- ☐ Verify the address and location of the property
- ☐ Verify if the caller is the owner of the property
- ☐ Check out the history of the property (foreclosed? vacant? previously listed? FSBO?)
- ☐ Check out the location and neighborhood (is it in an isolated place? a dangerous neighborhood?)
- ☐ Take a colleague with you
- ☐ Let your office, family, or a friend know where you are going and who you are meeting
- ☐ When touring the property, always let the owner walk in front of you
- ☐ Avoid going into attics, basements, walk-in closets, or small dead-end spaces





- ☐ Consider enabling location tracking and sharing on your phone...
  - Glympse
  - Life 360
- ☐ Install safety apps (ex. Circle of6, bSafe, Watch Over Me, Find Friends)
- ☐ Consider a dedicated work cell # and a personal cell # both going to the same phone
  - Configure response rules on phone based on the number being called
- ☐ Always have your phone on you
- ☐ Ensure the sound is ON and LOUD
- ☐ Keep the battery fully charged
- ☐ Check signal strength at the location
- ☐ Advise the office or a friend your location with a quick text/call
- ☐ Program emergency numbers and contacts
- ☐ Set up a distress or alert signal that your emergency contacts will recognize
- ☐ Inform the office, your family, and co-workers of what to do in case of an alert
- ☐ Provide the name and contact info of the client you are meeting
- ☐ Ask the office to call you on a regular schedule if you don't call in
- ☐ Take a picture of the prospect's license plate and send it to your office

## Personal Marketing/Ads



- ☐ Limit the amount of personal information you share
- ☐ Use your cell phone number in marketing materials, not your home phone
- ☐ Use the office address instead of your home address
- ☐ Avoid Glamour headshots. Choose a photo that exudes professionalism and simplicity



## Dress for Safety

- ☐ Don't wear expensive jewelry
- ☐ Always have your cellphone ON you
- ☐ Dress for the weather... this is Canada after all
- ☐ Wear comfortable shoes, ideally ones you could potentially run in
- ☐ Only carry the cash and credit cards you need. Avoid large handbags

## Tips for Sellers



- ☐ Remove/lock all personal information from home
    - family photos, particularly of children\*
    - keys, credit cards, cheques\*
    - anything that contains personal information including letters and bills, ID badges, address books, and family notes and schedules on the refrigerator or a bulletin board\*
  - ☐ Remove/lock all valuables
    - cash, jewelry, furs, crystal, small electronics, laptops, and valuables\*
  - ☐ Remove/lock all dangerous items
    - firearms and ammunition, knives, and other weapons \*
    - prescription drugs\*
  - ☐ Repair items like a loose bannister and remove obstacles that could cause a fall
  - ☐ Make arrangements to remove or secure pets during showings
  - ☐ Consider extra security or monitoring for the period that the property is on the market
  - ☐ After a showing, do a walk-through to check that doors and windows are locked, no items are missing, and nothing has been damaged
  - ☐ Don't show the home on your own if prospects or another agent comes to the door
  - ☐ Warn children not to open the door to strangers
  - ☐ Review homeowners insurance coverage is sufficient to cover injuries
  - ☐ Discuss the use and access of lockboxes and other entry systems with client
- ☐ \*These items should ALSO be out of sight during photographing and filming for virtual tours posted on the Internet.



- ☐ Warn about the potential of encountering allergens (mold, pet dander, etc.)
- ☐ Have a robust personal information storage and access protocol



- ☐ You have the ability to control how initial meetings happen
  - Always meet someone new for the first time in a public place - preferably your office when there are other people there.
  - Work with your client on your meeting, but do not let them control the appointment to the point of compromising your safety
- ☐ Always stick with your personal safety procedures.
- ☐ Allowing someone to exercise control over you from the outset could make them believe you are compliant and a potential target



- ☐ Join CAA or ensure you have other automotive support in case of breakdowns
- ☐ If your vehicle breaks down, move it to a safe place
- ☐ Remain inside your vehicle (if safe)
- ☐ Use the hands-free mode while driving
- ☐ NO texting, taking notes, doing paperwork, or reading while driving



*This is a huge and important topic. Canadian Real Estate Association has dedicated an entire section of [REALTORLink](#) to information security best practices for REALTORS®, Brokers, and Boards and Associations. To find it, login to REALTORLink® and click on CREA National Association on the drop-down box located under the REALTORLink® logo. You will find it under Products & Services – Information Security. Here you will have access to resources like:*

- ☐ Your Information Inventory: Understand What you are protecting
- ☐ How to Protect the Physical Security of Your Data
- ☐ How Hackers Can Abuse Your Trust
- ☐ Reducing Liability and Risk Through Information Security Policies
- ☐ How to Protect Sensitive Information
- ☐ How to Protect Yourself and Your Personal Information from “Phishing” Scams
- ☐ Beware of Dangers Lurking in the ‘Cloud’
- ☐ Protect Your Business: Info Security in Contracts
- ☐ Reduce Your Liability - Keep Only Data & Docs That You Need



## Environmental

- ❑ Be mindful of environmental dangers that could be lurking – some obvious and others not visible
  - Ozone generators or Ionizers
  - Ice
  - Grow ops & drug labs
  - Condition of home
  - Poor lighting masking risks
  - Carry flashlight
  - Allergens
  - Loose boards
  - Trip/fall hazards

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This booklet has been adapted from the National Association of REALTORS® *Real Estate Safety Matters: Safe Business = Smart Business* and input from the Cornerstone membership.

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