

**WHITE PICKET REALTY**

HOUSTON - 2x BATTLE OF THE BROKERS CHAMPION

**FREE PLAYBOOK FOR HOUSTON AGENTS**

# The Brokerage Switch Playbook

How to decide, plan, and execute a brokerage change without losing money, momentum, or clients.

*9 chapters. Worksheets. Scripts. A decision tree.*

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# What's inside.

Switching brokerages is the most under-thought, over-stressed decision in a real estate career. Agents either avoid it for years past the point of pain, or they pull the trigger on a referral from a friend without doing the math. This playbook is the structured way through. Nine chapters. Worksheets. Scripts. A decision tree. The same framework Alan teaches WPR agents who are joining from elsewhere — but written so it works whether you end up at WPR or anywhere else.

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## CHAPTER 01

# Why Agents Stay Too Long

The hidden costs of staying somewhere that isn't quite working.

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## The five reasons agents don't switch (even when they should)

Loyalty to the broker who recruited them. Sunk-cost in the office relationships. Fear of telling clients. Worry that the next place is the same in different colors. And the most common one: it's never quite painful enough on any one day to do the work of leaving. The result is years of suboptimal economics that compound into a real number. This chapter is about putting that number on paper.

## The 'frog in the pot' problem

Most agents don't notice their split, cap, or fee structure becoming uncompetitive — because the change happens slowly. The brokerage you joined three years ago at a 70/30 split with \$50/month tech fees is now a 60/40 split with \$150/month, \$2,000 in annual marketing fees, and a transaction fee on every closing. Each individual increase felt small. The cumulative position is a different brokerage than the one you signed up for. Audit yourself: what was your fee structure when you joined, vs. what it is today?

## Symptoms that you've stayed too long

You can't remember the last time your broker called you. Your office has lost more agents than it added in the last 12 months. Training has been replaced with video recordings. The CRM is the same one from 2019. Your split keeps creeping in the wrong direction. The best producer you knew left and didn't tell you why. None of these alone is a reason to leave. Three or more of them is a signal to start the math.

## The exit-cost myth

Agents wildly overestimate the cost of switching. They assume they'll lose clients, lose deals in progress, look unstable. In practice, agents who switch with a 60-day plan retain 90%+ of their sphere, transition every active deal cleanly, and look more professional, not less. The actual exit cost — for a properly planned switch — is usually 2-3 weeks of distraction. Compare that to a year of suboptimal economics.

## CHAPTER 02

# The Switch Math

Calculate the real annual difference. Make the decision on numbers, not feelings.

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## Run the comparison on your own production

Don't compare brokerages on marketing copy. Compare them on your numbers. Take your last 12 months: deals closed, total GCI, average sale price, average commission rate. Run that production through both your current brokerage's structure AND the new brokerage's structure. The output is two numbers: what you actually kept last year, and what you would have kept under the new structure. That's the only comparison that matters.

## The five line items in every brokerage's economics

1. Split — what percentage of each commission the brokerage takes before any cap. 2. Cap — the maximum dollar amount you pay the brokerage in splits per year before going to 100%. 3. Monthly or annual fees — desk fees, tech fees, E&O; insurance, association fees. 4. Per-transaction fees — what gets charged on every closing, separate from the split. 5. Marketing contributions — what (if anything) the brokerage gives back to your marketing. Most agents only know item 1 by heart. The other four are where the real differences live.

## Worksheet: My current year-one math

Fill in your own numbers: My closings = [X]. My GCI = \$[Y]. My average commission per closing = \$[Z]. My current brokerage took: split = \$[A], fees = \$[B], transaction fees = \$[C], marketing contribution = -\$[D]. Net I paid my current brokerage = \$[A+B+C-D]. Net I kept = \$[Y - (A+B+C-D)]. Now do the same math for the brokerage you're considering. The difference is the switch's annual ROI.

## The 5-year compounding view

Don't just compare year-one. A \$12,000 annual difference for the next 5 years isn't \$60,000 — it's closer to \$75,000 once you factor in the productivity unlock of operating in a better system (better leads, less time on admin, faster follow-up). Run the comparison over the realistic time horizon you'll be in real estate. Most agents are surprised by how much the gap compounds.

## CHAPTER 03

# What to Look For in a New Brokerage

The criteria that matter — vs. the pitch that doesn't.

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## The pitch is not the product

Every brokerage recruiter leads with three things: 'great culture,' 'best training,' and 'cutting-edge technology.' These are table stakes, not differentiators. The real product is what happens after you sign — the systems you actually have access to, the response time of your broker, the quality of the leads you receive, and how the brokerage shows up when you have a difficult deal. Demand specifics, not adjectives.

## The four-axis evaluation framework

Score every brokerage you're considering on four axes from 1-10: (1) Economics — splits, cap, fees, marketing fund. (2) Systems — CRM, lead routing, marketing tools, IDX, transaction management. (3) Leadership — broker accessibility, training quality, mentor availability. (4) Brand — local reputation, agent retention rate, recent peer recognition. A brokerage scoring 9 on economics and 4 on leadership is not the same brokerage as one scoring 7 across all four.

## Questions to ask in the recruiting meeting (that they don't want)

What's your agent retention rate over the last 24 months? How many agents joined and left in the last year? What's the average production of a new agent in their first year? Can I see a copy of the actual fee schedule, in writing? What does the broker do personally each week? When was the last time the technology stack changed? How do you handle commission disputes? If their answer to any of these is hand-wavy, that's data.

## The one-day site visit

Before signing anywhere, spend half a day in their office unannounced (or as a 'meet the team' visit). Watch how agents interact. See whether the broker is present. Check the parking lot at 10am on a Tuesday. Listen to what people actually talk about in the break room. A 4-hour visit will tell you more than 4 recruiting meetings.

## CHAPTER 04

# The 60-Day Pre-Switch Plan

What to do BEFORE you give notice. The work that protects your business during the move.

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### Days 60-45: Quiet preparation

Don't tell anyone — not your office friends, not your spouse if they'll worry-leak. Sign your new brokerage agreement first, contingent on a clean license transfer. Get a copy of your full client database from your current CRM (you have the right to your contacts). Photograph your office key codes, your file cabinet contents, anything you'll need to reproduce.

### Days 45-30: Documentation pass

Make a list of every active deal, every pending transaction, every client you've spoken to in the last 90 days. Note where each one is in your current systems (Dotloop file numbers, CRM stages, lender contacts). This list is what makes the actual switch clean — you'll thank yourself in week one of the new role.

### Days 30-15: Communication plan draft

Write your three-tiered communication plan now: (Tier A) the 10-20 closest sphere relationships who get a personal call. (Tier B) past clients and active leads who get a personalized email. (Tier C) the broader sphere who gets a clean announcement post. Have the scripts ready before you give notice — you'll have a 7-day window where every hour matters.

### Days 15-7: Final logistics

Confirm your new broker's license transfer process (in Texas: TREC requires written notice + new broker association within 48 hours of transfer). Update your email signature draft, business card mockup, social profiles drafts (don't publish yet). Calendar-block your first week at the new place. Pre-load the new CRM with the contacts you'll need first.

## CHAPTER 05

# The Switch Itself: 7 Days

The actual mechanics — what to say, in what order, to whom.

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### Day 1: Notice to your current broker

In person if possible. Be brief. 'I've made the decision to transfer my license to [new brokerage], effective [date]. I want to make this transition as clean as possible — for my clients, for my deals in progress, and for our relationship.' Don't justify, don't apologize, don't bring up grievances. Have your transition plan in writing to leave on their desk.

### Day 1-2: The license transfer paperwork

In Texas (or your state): submit the transfer-of-sponsorship form to TREC the same day you give notice. Your new broker will counter-sign. Get a confirmation number. Until the transfer posts, you cannot legally practice under the new brokerage's banner — usually 24-72 hours.

### Day 2-3: Tier A calls (10-20 calls, 90 seconds each)

Call your closest sphere relationships personally. Keep it short and confident: 'I wanted you to hear this from me first. I'm moving my license to [new brokerage] starting [date]. Same me, better systems behind me. Nothing changes about how I take care of you.' If they ask why, answer briefly and without bitterness toward the old place.

### Day 3-5: Tier B emails (personalized but templated)

Send 50-150 personalized emails to past clients and active leads. Use a template you customize for each recipient with at least one specific reference. Subject line: 'A quick update from me.' Body: announcement + reassurance + your new contact information + soft CTA to reach out with questions.

### Day 6-7: Public announcement

Now (and not before) make the public announcement — LinkedIn post, Instagram post, Facebook update. By this point your Tier A and B audiences have already heard it personally, so the public post doesn't catch anyone off guard. Keep it forward-looking, not retrospective.

## CHAPTER 06

# What to Tell Your Clients

Scripts for active deals, past clients, and the active sphere.

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### Active deal script (call, 60 seconds)

'Hi [Client], I wanted to call you personally with a quick update. I'm transferring my real estate license to [new brokerage] effective [date]. The good news for you: it's the same me, with the same level of service, on the same deal. Your contract is fully assignable to my new brokerage, and I've coordinated with [old broker name] to make this transition seamless. You don't need to do anything different. Any questions I can answer?'

### Past-client email (75 words)

'[Client], I wanted you to hear this from me first: I'm moving my real estate practice to [new brokerage]. The reason — better systems, stronger support, more resources for the kind of work I do with clients like you. Same email, same phone, same level of care. If you (or anyone in your circle) ever need anything real-estate-related, you're still in safe hands. — [Your name]'

### Active-lead email (60 words, less detail)

'Quick note: I've moved my license to [new brokerage]. Doesn't change anything about our conversation — same me, same numbers, same approach. New email might land in a new folder, so flag this one if you can. Talking soon — [Your name].'

### Handling the 'why did you leave?' question

Never bash the old brokerage. The honest, low-drama answer in 1-2 sentences: 'I wanted access to [specific system/tool/support] that wasn't available at my old place, and the math made sense to make the move now rather than in another year.' This signals professionalism. Bashing your old broker tells your client what you'll say about them when they're no longer your client.

## CHAPTER 07

# The 30 Days After

Re-establishing, ramp speed, and the early wins that lock in the decision.

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### **Week 1: Systems migration**

Migrate your CRM contacts. Set up the new IDX site (if your new brokerage provides one — at WPR, every agent gets a personalized Lofty IDX site Day 1). Update your email signature, business cards, social bios, and Zillow/Realtor.com profiles. Audit your active deal files for anything that didn't transfer cleanly.

### **Week 2: Training and tool ramp-up**

Take every onboarding training the new brokerage offers, especially the ones you think you don't need. The 'I already know this' agent is the one who never fully adopts the new system and never sees the upside of switching. Lean in for 30 days even if it feels like overkill.

### **Week 3: Re-engagement campaign**

Send a second-touch email to your full sphere — not announcing the switch this time, but with one piece of value (new market update, neighborhood report, free guide). This re-establishes the rhythm of communication and quietly reinforces that you're still active and producing.

### **Week 4: First-30-day review**

Sit down with your new broker for a structured check-in. Cover: which tools are working, which aren't, what's blocking you from full production, what relationships you need help making. The agents who DON'T do this review take 6 months to ramp. The ones who do it ramp in 6 weeks.

# Mistakes to Avoid

The avoidable pitfalls that turn good switches into messy ones.

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## **Mistake 1: Public announcement before Tier A calls**

If your sphere finds out from LinkedIn before they find out from you, the message they receive is 'I am not in your inner circle.' That damages relationships you spent years building. Always: in-person/phone first, email second, public last.

## **Mistake 2: Bashing the old brokerage**

The single fastest way to look unprofessional. Even if the old place was genuinely bad, the agent who badmouths it sounds petty, not principled. Take the high road every single time. Your clients are watching how you handle the transition more than they're listening to your reasons.

## **Mistake 3: Leaving deals on the table**

If you have an active deal that's structurally hard to transfer (e.g., a co-listing where the seller specifically signed with your old brokerage as the entity), don't try to grab it on the way out. Finish it cleanly under the old brokerage's umbrella, even if the commission split is unfavorable. Your reputation outlasts any single commission.

## **Mistake 4: Under-communicating with active leads**

An active buyer or seller lead who hears nothing during your transition assumes you've abandoned them. They go to Zillow. They contact another agent. Communicate three times in the first two weeks, even if there's nothing new — just to remind them you're still on it.

## **Mistake 5: Skipping the 60-day plan**

The agent who decides 'I'm moving Monday' and gives notice on Friday is the one who looks chaotic, drops balls, and confirms their old broker's lowest opinion of them. The 60-day plan is what separates a professional move from a panic move.

## CHAPTER 09

# Should I Switch? The Decision Framework

The 10-question diagnostic. Score honestly. Decide cleanly.

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## Score yourself on these 10 questions (each 1-5)

1. How accessible is your broker in any given week? 2. How recently was your CRM/tech stack updated? 3. How transparent is your fee structure? 4. How would you rate your last training session? 5. How fair has commission resolution been? 6. How would you rate your sphere of available mentors? 7. How happy are the top 3 producers at your office? 8. How well does your broker handle difficult deals? 9. How current is your broker on Houston-market specifics? 10. How proud are you to say where you work? Add it up.

## What the score means

40-50: Stay put. Your current place is genuinely good for your stage. Reinvest the energy you would have spent switching into your production. 30-39: Worth a serious look. Run the switch math against 1-2 alternatives before deciding. 20-29: You should probably switch. Do the 60-day plan deliberately. Below 20: Run, but professionally. Use the 60-day plan to switch with integrity, even though every fiber of you wants to leave tomorrow.

## The non-scored question that overrides all of them

If your broker has done anything in the last 12 months that violated TREC rules, fair housing, or basic ethical standards — your score doesn't matter. Move. The risk of staying somewhere with bad ethics is bigger than any economic upside you might be giving up.

## Your next 24 hours

If your score said 'worth a look' or worse: in the next 24 hours, identify two brokerages worth running the switch math against. Schedule a 30-minute exploratory conversation with each. You're not committing — you're collecting information. Most agents stay where they are because they never started this step. Don't be that agent.

## OUTRO

# About White Picket Realty

This playbook is designed to work whether you end up at WPR or anywhere else. If you do want to run the switch math against WPR specifically, here's what we offer Houston agents: \$6,500 annual cap (limited time), \$100/month flat fee, \$250-per-closing broker marketing contribution back to you, no transaction fees, no exit penalties, Lofty AI CRM included Day 1, IDX website included, and live BET training with Alan every Tuesday for 52 weeks a year. The door is open if you want to talk it through.

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Want to talk about running the switch math against WPR specifically? [Book a 15-minute confidential chat with Alan →](#)