MULTISTATE BROKER OF RECORD

Practice Overview · Designated / Qualifying / Principal Broker for TX · FL · GA · TN · UT

WHAT WE ARE

Multistate Broker of Record holds the licensed broker-of-record designation for real estate companies that need a designated, qualifying, or principal broker on file with state commissions in Texas, Florida, Georgia, Tennessee, and Utah. The client is the company itself, not an individual agent, and the engagement covers state-level broker supervision without the company having to hire a full-time broker. Where we are not licensed, we can often cover the work through a partner broker, confirmed in writing before you sign.

STATE COVERAGE

State	License #	Title	Governing statute
Texas	595597-B	Designated Broker (TREC)	Tex. Occ. Code §1101.355
Florida	BK3555118	Real Estate Broker (FREC)	Fla. Stat. §475.161
Georgia	428909	Qualifying Broker (GREC)	O.C.G.A. §43-40-18
Tennessee	388033	Real Estate Broker (Tennessee REC)	Tenn. Code Ann. §62-13-309
Utah	13828856-PB00	Principal Broker (Utah DRE)	Utah Code §61-2f-206

WHAT'S INCLUDED IN AN ENGAGEMENT

- Designated, qualifying, or principal broker on file with the state commission for the entity's licensed activity
- Written Policies & Procedures manual customized to the firm's state(s), business model, and licensee count, as every state's broker-supervision rule requires
- Quarterly compliance reviews, documented and signed (cadence varies by tier)
- Advertising review and sponsored-licensee oversight, including CE and renewal tracking
- Trust-account and operating-account compliance review where applicable

ENGAGEMENT TIERS

Tier	Monthly fee	Fit
Starter	$500–$800	Low-touch sponsorship; established operators with low transaction volume
Standard	$1,000–$2,500	Active oversight; regular transaction activity, multi-state coverage under one engagement
Intensive	Custom	High-volume, multi-entity, institutional, or elevated-risk engagements

No onboarding fee. No setup cost. No first-month surcharge. The monthly fee starts once coverage is active with the state.

WHO WE SERVE

PropTech startups · rental and listing platforms · vacation and short-term rental operators · iBuyers and flat-fee MLS services · property management companies (tech-enabled and traditional) · investment funds, syndicates, and holding LLCs · traditional brokerages and real estate teams without an in-house senior broker · commercial real estate firms (office, retail, industrial, multifamily, mixed-use) · business brokers and M&A advisors whose deals touch real property.

TRACK RECORD + PRACTICE LEAD

Active broker-of-record engagements across Texas, Utah, and Georgia, with the longest continuous engagement dating to 2019 (national rental platform). The roster spans rental aggregators, property management operators, PropTech platforms, and investment entities. Every engagement is verifiable through the relevant state commission's public license database.

David Montalvo is a real estate broker licensed in five states (Texas since 2015), a 20-year U.S. Air Force veteran, SDVOSB, and PMP® credentialed since 2009. Over 17 years his licensed brokerage operations have closed about 500 transactions and $140M+ in volume, combining direct-practice work and supervised production from sponsored agents. He is personally responsible to each state commission for every sponsored firm.

Worth 30 minutes to scope your current setup?

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