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EDMUND'S MASTERMIND · COURSE STUDY

SELLING TO NOSY NEIGHBORS

Circle Prospecting That Turns One Listing Into the Next

Seven modules for working real estate agents. What the research on neighbors and listings actually says, with its limits; the rules of the street, from Do Not Call to the door, the mailbox and fair housing; and three systems: The Seller's Yes, The Circle Sheet and The Front Porch — with six exercises, six prompts and answer keys.



PREPARED BY EDMUND BOGEN · WEDNESDAY, DECEMBER 16, 2026

COURSE STUDY

How to use this course study

Three systems, in order: the seller's written yes, who you may reach and how, and one neighbors' hour.

Most circle-prospecting advice says knock more doors. This course asks for three things first, in order: your seller's yes in writing; a sheet that says how you may reach every home around the listing and what you may say; and one neighbors' hour, run safely and fairly. The prompts are in Appendix C, near the end on purpose: you cannot judge an AI-written door script until you know which lines are off limits.

The course map

#	Module	The skill it teaches	Pages
1	What the research actually says	Neighbor effects, how sellers choose an agent, the open house, the call data, the coaches, the season	4–10
2	The rules of the street	Phone, door, mailbox, fair housing, Article 16, seller confidentiality, advertising	11–17
3	System 1: The Seller's Yes	The seller's written sign-off, the MLS clock, the no-circle option	18–20
4	System 2: The Circle Sheet	One row per home: scrubbed phone, door rules, flags, approved words	21–24
5	Scripts that stay on the house	House, price, market and open times; special doors; AI drafts checked	25–30
6	System 3: The Front Porch	A neighbors' hour: before, during and after	31–35
7	Your 30 days	Dec 16 to Jan 15, with the quiet week kept	36–37
✓	Assessment and appendices	Answer keys, Circle Sheet card, prompts, door and phone lines, questions, glossary, sources	38–51

EXERCISES AND ANSWER KEYS

Six exercises sit where each skill is taught. All use invented sample data: Coral Vine Lane, Sample Shores, Jordan Lee, Sample Realty Group and every neighbor. Do them on paper, then check Appendix A, which gives the reasoning, not just the answer.

THE APPENDICES

- **A** Answer keys
- **B** One-page Circle Sheet reference card
- **C** The six prompts
- **D** 25 door and phone lines to practice on
- **E** Questions for your broker, MLS and counsel
- **F** Glossary and sources

WHAT YOU NEED

- One listing, now or next
- Your broker's Do Not Call registry access and written policy
- The county parcel file and an MLS search for the street
- An AI tool your broker has approved, with training turned off
- Your broker's answers to page 48

Read this first. This book is education, not legal advice. Agents follow their broker's policy, their MLS rules and their own state's law. Florida rules are examples; other states differ. Nothing here dials, texts or sends for you. Products and prices are dated examples, not recommendations. Short on time? Read pages 4, 5, 11, 13, 15, 18, 21 and 31 first.

COURSE STUDY



Why this session matters

Every new listing comes with an audience. Neighbors watch the sign go up, look up the price and walk past on open-house day, and some of them are quietly wondering what their own home is worth. Call them nosy if you like; we mean it kindly. They are interested people, and their curiosity is an opening, not a target. A published study found that when nearby homes were listed, the chance that a homeowner listed rose by 11–15%, a relative increase (Irwin & Livy, Journal of Housing Research, Oct 2026). That means "more likely," never "will," and it comes from one metro (Baltimore, 2013–2015).

The agent who is already on the street has the edge. In NAR's 2025 Profile of Home Buyers and Sellers, 80% of sellers contacted only one agent, and 66% used an agent who was referred to them or whom they had used before. As of Nov 4, 2026, NAR had not released a 2026 Profile. So the agent who is helpful and known on the street is more likely to get the call. We found no independent study of how often circle prospecting turns into a listing, so this book gives you no conversion rate.

This session gives you three systems, in order. The Seller's Yes: nothing goes to a neighbor until your seller signs off. The Circle Sheet: one row per home, with the channel you may use after a Do Not Call scrub and the words you may say, about the house and never about who lives there. The Front Porch: a neighbors' hour run safely and fairly, alongside full marketing. Build the first two Dec 16–22. From December 2025 to January 2026, new listings rose 41.1% nationally and 46.5% in Florida (Realtor.com data via FRED). That is a seasonal pattern, not proof that December prospecting works. It is why the neighbors' hour and its follow-ups belong in January, after the quiet week.

What you'll learn

We will master 3 systems live, together:

1 · The Seller's Yes. Nothing goes out until they sign: what you may share, what stays private, and the neighbors' hour.

2 · The Circle Sheet. Every home, and how you may reach it: the channel after a Do Not Call scrub, the door rules and the approved words.

3 · The Front Porch. A neighbors' hour, open to everyone: run safely, beside full marketing, with a card that asks permission.

COURSE STUDY

Already in your library, and what is new here

This session works one street around one listing. The farm, the phone table and the mail rules are already in earlier workbooks. Use them.

When you need…	Use this	From the workbook
The farm itself: ZIP-code farming, the weekly market report	System 3, The Neighborhood Domination Grid	Prospecting in the AI Age (May 13, 2026)
The seller's choice of public, preview or private, in writing	The Three-Path Map; the Choice Record	Private, Preview, or Public? (Nov 11, 2026)
The interest list and the launch calendar the open house fits into	The Launch Flywheel	The Coming-Soon Machine (Aug 19, 2026)
The full phone and text table; automated consent; FCC 26-67; Florida line by line; gifts and RESPA	Module 2, Lessons 2.3, 2.4, 2.6, 2.7 and 2.8	Holiday Networking (Dec 2, 2026)
The quiet week and the January message	Dec 23–Jan 1, no outreach; The January Callback, Jan 4–15	Holiday Networking (Dec 2, 2026)
The mailbox rule, and a check for anything you mail	Lesson 2.1; the Module 6 pre-send checklist	Snail Mail in the Age of AI (Dec 9, 2026)
A fair-housing check on any AI-written copy	The Fair Housing Firewall	Keeping AI Compliant (Sep 23, 2026)
Owners listed with another broker	Article 16 and its "two narrow doors"	The Expired Goldmine (Aug 12, 2026)
AI dialers and texters; what AI may do on its own	Module 3 (FCC 26-67); the Autonomy Dial; the Known Number	AI in 2027 (Nov 25, 2026)
Artwork for hangers and invitations, with no people in it	The Landmark Library; the Image Engine	Neighborhood Famous (Sep 16, 2026)

What is new in this session

"Circle prospecting" appears nowhere in the library, and neither does blockbusting or the "help choose your neighbor" idea. New here: Florida's statewide "No Commercial Solicitation" sign (Fla. Stat. 501.062, in force since July 1, 2026); blockbusting, and HUD's rule that names "uninvited solicitations for listings"; the "help choose your neighbor" line and its safe replacement; the city, HOA and gate rules for the door; Article 16 on the doorstep; the seller's written yes before any outreach; and a sign-in card that asks permission.

Updates to earlier workbooks

FOUR UPDATES, EACH SAID ONCE

- **Prospecting in the AI Age (May 13, 2026)** says geographic farming with AI personalization "beats traditional farming 10:1" and that hyper-targeted content beats mailers "at 1/5 the cost." We could not find a source for either number. Do not repeat them.
- **The same workbook's System 1**, the Cold-to-Closing Script Stack, has a prompt for a cold text to a FSBO seller with no Do Not Call step. A text to a cell phone counts under the Do Not Call rules (47 CFR 64.1200(e)). Scrub before you send it, and do not reuse it for neighbors.
- **The Coming-Soon Machine (Aug 19, 2026)** offers interest-list members "a private slot, if my seller agrees." Before you offer neighbors anything like it, run the MLS clock check on page 18.
- **Snail Mail in the Age of AI (Dec 9, 2026)** said it did not research HOA or city rules on door hangers. Page 13 fills that gap for Florida.

MODULE 1 LESSON 1.1

When homes nearby list, neighbors become somewhat more likely to list

The most direct evidence is one study of one metro. It points the right way. It does not promise a listing.

BY THE END OF THIS MODULE YOU CAN

- Explain what Irwin & Livy found, and why the right words are "more likely," never "will"
- Quote NAR's 2025 Profile correctly, including what it bundles together
- Say plainly what we found no study measuring about circle prospecting

Nicholas Irwin and Mitchell Livy took every residential parcel in the Baltimore, Maryland metro area from 2013 to 2015, together with every home listed for sale, and ran duration models. Nearby listings at the same time were linked to an **11–15 percent increase in listing likelihood**. The result held across several definitions of neighborhood size. The authors describe it as a "positive multiplier effect" of nearby listings on seller motivation.

READ IT CAREFULLY

- It was posted as an SSRN working paper in July 2025 and **published in the *Journal of Housing Research* on Oct 22, 2026**. We read the published abstract, not the full article.
- One metro, three years of data.
- The 11–15% is a **relative** increase in likelihood, not percentage points. If few homes on a street would have listed anyway, a relative rise is still a small number of homes.
- The exact distances were not in the abstract we read.
- The abstract adds that big gains in school quality and better house quality magnify the effect. A finding, never a door line: the blockbusting rule names school quality (24 CFR 100.85(c)(2), page 15).

1.2 People copy what they see on their own block

What the study found	Study	Read it as
Novice investors entered after seeing investing within about 0.10 miles (one city block). Each neighbor who began investing raised a household's chance of investing by 8% within a year, up to 20% over three.	Bayer, Mangum & Roberts, *American Economic Review*, 2021; magnitudes from NBER WP 22065 (2016); Los Angeles	About investors buying, in the 2000s bubble. Not owners deciding to list.
Households were 7% more likely to refinance if a neighbor within 50 meters had recently refinanced. The effect faded with distance.	McCartney & Shah, Philadelphia Fed WP 21-16, 2021	About refinancing. Shows neighbors talk money at very short range.
People whose distant Facebook friends saw bigger price gains were more likely to switch from renting to owning, and paid more.	Bailey, Cao, Kuchler & Stroebel, NBER WP 22258, 2016; *J. Political Economy*, 2018	Distant friends, not neighbors. People act on the price stories they hear.
A neighboring foreclosure raised the chance of further defaults by 18% among the 13 nearest parcels (Maryland, 2006–2009).	Towe & Lawley, *AEJ: Economic Policy*, 2013	Distress. Never in a script.

What this means for you. What people see on their own block changes what they do with real estate. Use that as the reason the street matters, not as proof that a sign makes neighbors sell. On our reading, the agent who brings accurate local facts joins a conversation already under way.

Avoid
"When a house lists, the neighbors list next."

Better
"Research on Baltimore found that when homes nearby go on the market, neighbors become somewhat more likely to list too. More likely, not certain."

MODULE 1 LESSON 1.3

Most sellers call one agent, and most of them were referred

The national survey is the strongest reason to be known on the street. Read what it bundles together, and what it cannot tell you.

80%
OF SELLERS CONTACTED ONLY ONE AGENT

66%
USED A REFERRED AGENT OR ONE THEY HAD USED BEFORE

11%
CHOSE MAINLY FOR KNOWLEDGE OF THE NEIGHBORHOOD

How sellers found their agent (Exhibit 7-2)	Share
Referred by (or is) a friend, neighbor or relative	37%
Used the agent before	29%
Personal contact by the agent (phone, e-mail, etc.)	5%
Website · referred by another agent	4% · 4%
Visited an open house and met the agent	3%
Direct mail · saw contact information on a For Sale or Open House sign · walk-in	2% · 2% · 2%
Employer or relocation · social page without a connection · advertising specialty · crowdsourcing on social media	1% each
Other	11%

Also from the 2025 Profile	Figure
Sellers who contacted one / two / three / four / five or more agents (Exhibit 7-3)	80% / 12% / 5% / 2% / 1%
What mattered most in choosing: reputation · honest and trustworthy · friend or family · **knowledge of the neighborhood** · caring personality · commission (Exhibit 7-7)	35% · 22% · 15% · **11%** · 5% · 4%
Used the same agent to buy and to sell; for sellers within 10 miles of their purchase (Exhibit 7-4)	51%; 72%
Would definitely or probably recommend their agent; already had, at least once (Exhibits 7-9, 7-10)	87%; 65%

NAR mailed a 120-question survey in July 2025 to 173,250 recent buyers and received 6,103 responses (adjusted response rate 3.5%, margin ±1.25% at 95% confidence). **Seller figures come from buyers who also sold a home.** Published November 2025; the full report was read from a member-distributed copy. As of Nov 3, 2026 NAR had not published or announced a 2026 edition, so this book uses the 2025 Profile.

What this means for the street. NAR groups "neighbor" with friend and relative, so there is no separate number for neighbors. Agent outreach as a channel is small: personal contact 5%, direct mail 2%, a sign 2%, an open house 3%. On our reading, circle prospecting works mostly by *creating* the relationship that later shows up in the survey as "referred." Neighborhood knowledge ranks fourth, ahead of commission. And a local move tends to stay with the local agent.

Avoid
"37% of sellers were referred by a neighbor."

Better
"37% found their agent through a friend, neighbor or relative. NAR doesn't split out neighbors (2025 Profile)."

MODULE 1 LESSON 1.4

The sign, the open house, and the neighbor who sells to a friend

Buyers use open houses. A small share find their home through someone they know. And neighbor-to-neighbor sales tend to skip agents.

What buyers did (2025 Profile)	Share	Exhibit
Used open houses as an information source · rated them "very useful"	48% · 43%	3-2, 3-4
Used yard signs · rated them "very useful"	32% · 28%	3-2, 3-4
Said visiting open houses was their *first* step	3%	3-1
Found the home they bought through a friend, relative or neighbor	9%	3-6
Found it on the internet · through an agent	52% · 27%	3-6
Found their agent through a friend, neighbor or relative (first-time buyers 49%)	43%	4-6
Met their agent at an open house	5%	4-6
Interviewed only one agent	74%	4-8

How agents marketed the home (Exhibit 7-8)	Share of sellers
MLS · yard sign · open house	85% · 67% · 59%
Realtor.com · agent website · third-party aggregators · company website	50% · 49% · 46% · 42%
Social networks · virtual tours · direct mail · virtual open houses	23% · 20% · 9% · 5%

1.5 Long owners, and the sale that skips the agent

In the 2025 Profile, the median seller had owned the home for **11 years**, an all-time high (Exhibit 6-17). **91%** of sellers used an agent and **5%** sold by owner, an all-time low. For **30%** of those owner-sellers, the main reason was that they sold to a relative, friend or neighbor. Among sellers who already knew their buyer, **38%** sold the home themselves (Chapter 8). Exhibit 3-6 also shows small slices for signs and builders; their values are not printed in the text, so we do not quote them.

Our reading. A long-time owner may not know what the home is worth today, and a fresh listing on the street is a natural reason to talk about it. About 1 buyer in 11 found the home through someone they knew, so a neighbor who "knows someone" is real but a minority channel. When neighbors deal with each other directly, they often leave agents out. Being the agent the street already knows is how you stay in that conversation.

Avoid
"Neighbors pick the next buyer, so the open house is really for them."

Better
"About 1 buyer in 11 found their home through someone they knew. The open house is for everyone, and the neighbors are welcome."

MODULE 1 LESSON 1.6

What the call data say, and what is missing

There is one academic test of cold calling and one large vendor data set. Neither measures circle prospecting around a listing.

209	16.2	None
CALLS PER APPOINTMENT OR REFERRAL, RANDOM LIST (BAYLOR, 2012)	DIALS PER LIVE CONVERSATION ON NEIGHBORHOOD LISTS, PER VULCAN7 (VENDOR DATA)	INDEPENDENT STUDIES OF CIRCLE-PROSPECTING CONVERSION FOUND

The Baylor test. In November 2011, 50 Keller Williams agents (of 160 recruited, across four U.S. time zones) each called one hour a day for seven days over two weeks. They made **6,264 calls** to a **random, unqualified list** in areas they had not marketed to. 28% of calls were answered, 55% went unanswered and 17% were non-working numbers. Result: 19 appointments, 11 referrals and 132 callback requests, about 330 calls per appointment and 209 per appointment or referral. Calls from 10 a.m. to 2 p.m. were 31% of dials but produced 53% of the appointments and referrals. The author said the question may remain unanswered, called the results encouraging, and asked for more research (Lampertz, Keller Center Research Report, Baylor University, Sept 1, 2012).

The vendor data. Vulcan7 reports 76,878,081 dials from normal use of its platform, January 2024 to April 2026. Live connections per attempt: 6.06% overall, about 16.5 dials per conversation; **neighborhood search (circle prospecting) 6.2%, 16.2 dials**; FSBO 9.0%; expired 5.5%. Best hour 11 a.m. ET, with 10 a.m. to 3 p.m. best overall. Appointments and listings are not tracked, about 30% of attempts carry no outcome code, and no Florida rate is given (Vulcan7, "The State of Real Estate Prospecting in 2026," data through May 1, 2026). That is a vendor claim with its method described.

WE SEARCHED AND FOUND NONE OF THESE

- A peer-reviewed or independent study of circle-prospecting conversion (calls, knocks or mail around a listing) with a stated method.
- Any study of results from a neighbors-only open house.
- Any sourced response rate for real estate door hangers.
- A causal study showing that December prospecting produces more January listings.
- A separate NAR figure for "neighbor" as a referral source.

NUMBERS YOU WILL HEAR THAT HAVE NO METHOD

- Door-knock conversion percentages from vendors and the articles that repeat them. The only source given is "statistics gathered from real estate agents."
- "Appointments per 100 dials" for just-sold calling, from summaries that name no study.
- A vendor's one-agent figure that differs from NAR's current 80%, and vendor testimonial dollar figures. Do not present any of these as typical.

Avoid
"Circle prospecting converts at [any percentage]."

Better
"We found no independent measure of it. Even a random cold list in 2011 produced an appointment or referral about every 209 calls. A listing on the street gives you a better reason to call."

MODULE 1 LESSON 1.7

What the coaches teach: practice, not data

Paraphrased, with one direct quote. Read these as experienced advice. None of them reports a measured result.

Who, where, when	What it teaches (paraphrased)
Tom Ferry, tomferry.com, "Real Estate Door Knocking Scripts for Open Houses," Aug 31, 2026	Knock 2–5 days before the open house: every home on the listing's street first, then 3–4 surrounding blocks. Four beats: introduce yourself, name the listing and hand over the invitation; ask whether they know anyone who would like to move into the area; restate the invitation as a chance to see inside; then ask whether they have thought about selling, pause, and if not, thank them and move on. Follow up with attendees within 24–48 hours.
Tom Toole on Tom Ferry's *Confidence & Conversion*, Ep. 5, Feb 18, 2022	Use the open house as the reason for a circle call, and ask for a referral first. In his words: "Don't ask the homeowner themselves. Ask if they know anybody."
The Close, Brittany Wrenn, circle prospecting playbook, updated Jun 26, 2025	Keep the circle small, about 20–50 homes. Mix letters, calls, texts and knocks, and offer something of value such as a market analysis. Scrub the list against Do Not Call and check local door-knocking rules. Includes a short invitation to a neighbor-only sneak peek before the public open house.
The Close, Sophia Doyle, door-knocking guide, Apr 15, 2026	About 20 doors a day. Some cities require permits or ban door-to-door; HOAs may restrict it; respect "no soliciting" signs; say you are a licensed agent; carry materials with your name and brokerage; put nothing in mailboxes; do not go back after a "no."
Darryl Davis, Inman, Jul 31 and Aug 18, 2026	Hold a neighbors-only showing in the first week or two after the listing goes live, before the public open house. Invite by hand-delivered note or a short call, and say the owners will not be there. Knock or call 50–100 nearby homes. Follow up within 24 hours with what you promised and a market report for their street.
Kyle Crawford, Century 21 New Millennium, Inman, Nov 3, 2026	A few days before, walk the street and invite neighbors to an early look, without pitching. Warn them about parking. Share a listing page and QR code. Keep neighborhood information about the property, not the people.
Mike Ferry, via The Close's summary (Aug 2024, updated Dec 2024)	Use your recent listings and sales to start conversations in the same area. His exact scripts are a paid product; we did not see them.

TWO CORRECTIONS BEFORE YOU USE THESE

- **Davis also suggests ringless voicemail.** The FCC treats ringless voicemail to a cell phone as a call that needs the consumer's consent (FCC 22-85, 2022). Leave that part out (page 12).
- **"Anyone who would like to move into the area"** is close to a line that goes wrong. Ask who would love the *street*, and say it is open to everyone. Never ask whom they would like as a neighbor (page 15).

Not found: official Keller Williams or Buffini & Company material on neighbor previews or circle prospecting, and RISMedia articles on these topics from 2024–2026. Do not attribute the neighbor preview to either company.

Avoid
Reading a coach's script word for word as if it were yours.

Better
Take the order of the beats. Write your own words, from your seller's approved facts (Module 5).

MODULE 1 LESSON 1.8

The season: a quiet December, then the January jump

New listings fall in December and jump in January, in Florida more than nationally. That is a calendar pattern. It is not evidence that December prospecting causes anything.

New listings (Realtor.com data via FRED, not seasonally adjusted)	December	January	Change
United States, Dec 2025 → Jan 2026	235,040	331,624	**+41.1%**
United States, Dec 2024 → Jan 2025	237,762	327,020	+37.5%
United States, Dec 2023 → Jan 2024	235,584	295,190	+25.3%
Florida, Dec 2025 → Jan 2026	32,612	47,764	**+46.5%**
Florida, Dec 2024 → Jan 2025	36,392	50,524	+38.8%

FRED series NEWLISCOUUS and NEWLISCOUFL (Realtor.com Housing Inventory Core Metrics, via the St. Louis Fed), checked Nov 3, 2026, data through September 2026. The percentages are our arithmetic. Realtor.com's own January 2026 report text could not be opened, so it was not read.

Nationally, new listings fell 29.0% from November to December 2025, and the 2026 peak so far was April (477,118). Florida is different: **January 2026 was its busiest month of 2026 for new listings** (47,764, ahead of February's 46,170 and March's 46,208). January 2026 was 1.4% above January 2025 nationally and 5.5% below it in Florida.

A second source. The RE/MAX National Housing Report for January 2026, built from RE/MAX's own 52-metro MLS sample, showed new listings up 61.8% from December and down 3.8% from a year earlier. Miami had the highest months' supply of the 52 metros (7.0) and the lowest close-to-list price ratio (93.3%). A broker quoted in the report said some sellers had simply taken homes off the market for the holidays, so part of January's "new" supply was relisted homes. Always name the source with the figure: 61.8% is RE/MAX's sample; 41.1% is Realtor.com's national count.

A HOLIDAY WITHDRAWAL MAY STILL BE SOMEONE ELSE'S LISTING

A home on your street that went off the market for the holidays may still be under an exclusive agreement with another broker. On our reading, treat it as "listed with another broker" on your Circle Sheet until you know otherwise (Article 16, page 16). The Expired Goldmine (Aug 12, 2026) covers what changes when an agreement ends.

Holiday calling. Vulcan7 reports that answer rates across the 23-day Christmas and New Year window were 6.29%, 0.21 points above its baseline. That is a vendor claim. This book still keeps Holiday Networking's quiet week: no outreach Dec 23 to Jan 1.

Avoid
"Prospect in December and you'll get January's listings."

Better
"December is the quietest month for new listings, and January brought about 41% more nationally and 46% more in Florida last season (Realtor.com via FRED). The neighbor you meet now is deciding about January."

MODULE 1 LINES YOU CAN SAY

What you can say out loud, and how to say it

Every line below is sourced. Each one says who found it and when. Use them at the door, on the phone and with your seller.

A line you can say	Source
"When homes nearby go on the market, neighbors become somewhat more likely to list too."	Irwin & Livy, "Close Competition," *Journal of Housing Research*, published online Oct 22, 2026 (Baltimore, 2013–2015)
"Eight in ten recent sellers contacted only one agent before choosing one."	NAR 2025 Profile of Home Buyers and Sellers (Nov 2025), Exhibit 7-3
"Two out of three sellers hire someone they were referred to or used before."	NAR 2025 Profile of Home Buyers and Sellers (Nov 2025), Exhibit 7-2 (66%)
"About half of buyers use open houses to look at homes."	NAR 2025 Profile of Home Buyers and Sellers (Nov 2025), Exhibit 3-2 (48%)
"The typical seller had owned their home 11 years, a record."	NAR 2025 Profile of Home Buyers and Sellers (Nov 2025), Exhibit 6-17
"Nationally, January brought about 41% more new listings than December last season. In Florida it was about 46%."	Realtor.com data via FRED, Dec 2025 → Jan 2026

EXERCISE 1 · KEEP, FIX OR DROP

Seven lines you might hear in an office meeting this month (sample wording). For each, write Keep, Fix or Drop, and then the version you would say. Use only facts from this module.

1. "When a house lists, the neighbors will list next."
2. "37% of sellers were referred by a neighbor."
3. "Most sellers only talk to one agent, so be the first one at the door."
4. "The Baylor study proved cold calling doesn't work."
5. "Door knocking converts about two percent."
6. "January had 61.8% more new listings than December."
7. "The 2026 NAR Profile shows referrals are up."

Answer key: Appendix A, page 39.

MODULE 1 REVIEW · ANSWER FROM MEMORY

1. What did Irwin & Livy find, where was it published, and why is the 11–15% a relative number?
2. What does NAR's 37% bundle together, and what two figures make the case for being known on the street?
3. What did the Baylor test call, and what did the author conclude?
4. Which two sources give the December-to-January jump, and why do you name the source with each figure?
5. What has no independent study measured, and so what does this book refuse to give you?

MODULE 2 LESSON 2.1

Scrub before you call or text a neighbor

A call or text about your listing is a sales call. Living nearby is not a reason to call a registered number.

BY THE END OF THIS MODULE YOU CAN

- Decide, home by home, whether you may call or text, and why
- Keep calling hours, your name, automated tools and stop requests straight
- Knock, leave notes and talk about the street within fair housing, Article 16 and your seller's confidentiality

The federal rule (47 CFR 64.1200(c)(2)). "No person or entity shall initiate any telephone solicitation to: … (2) A residential telephone subscriber who has registered his or her telephone number on the national do-not-call registry…" A telephone solicitation is "the initiation of a telephone call or message for the purpose of encouraging the purchase or rental of, or investment in, property, goods, or services" ((f)(15)). It reaches "text messages to wireless telephone numbers" ((e)) and local calls.

On our reading, "I've just listed 14 Coral Vine. Know anyone who'd love the street?" encourages the purchase of property and your services, so it is a telephone solicitation. The reasons you may call a registered number differ by list.

The reason	National registry (47 CFR 64.1200)	Florida's list (Fla. Stat. 501.059)
Signed, written permission	Yes: a "signed, written agreement" to be contacted that "includes the telephone number" ((c)(2)(ii)).	Yes: a signed request to be contacted is an "express request of the person called" ((1)(k)1.). **The sign-in box is the Florida-safe route** (page 33).
A past client	Yes: a transaction within the 18 months before the call, not ended by a do-not-call request ((f)(5)).	Yes: "a prior or existing business relationship" ((1)(k)3.). Keep to the federal 18 months as well.
An inquiry	Yes, for 3 months after the person asked about your services ((f)(5)).	Only a call "in response to an express request of the person called" ((1)(k)1.).
A personal relationship	Yes: "any family member, friend, or acquaintance" ((c)(2)(iii), (f)(17)): on our reading, someone you know personally who would expect your call (Holiday Networking 2.3). A name is not enough.	**No.** Florida has no family, friend or acquaintance exception.

In a Florida circle, the Florida column decides. Florida's list includes every Florida number on the national registry ((3)(d)), so a registered number there needs the signed box, a past-client relationship, or a request you are answering. Not a reason on either list: living nearby, being your seller's friend, a county record, a vendor's number for a stranger. A colleague's past sale through your brokerage: ask your broker (the relationship is with the business you call for; (f)(5)(ii)).

2.2 The licensee carve-out, and the scrub itself

Florida's real estate carve-out is narrow: it covers a licensee who calls a seller or landlord "in response to a yard sign or other form of advertisement placed by the seller or lessor" (501.059(4)). A circle call answers nothing the neighbor placed, so **the Florida list applies, with no licensee exemption**. Federally, agents are not exempt either.

The FCC's safe harbor needs written procedures, trained staff, your own do-not-call list and a registry copy "no more than 31 days prior to the date any call is made," with records (64.1200(c)(2)(i)). Your broker usually holds the access. Honor do-not-call requests within 10 business days; keep them 5 years. Full table: Holiday Networking, Lesson 2.3.

Avoid
"We're neighbors, so the Do Not Call list doesn't apply."

Better
"May I text you at this number about homes on the street? If so, please tick and sign this box."

MODULE 2 LESSON 2.3

Eight to eight, your name first, no robots, and any stop is final

Once a number is allowed, these rules decide when you call, what you say first, and which tools stay switched off.

Rule	What it says	Source
Florida hours and frequency	No commercial solicitation call "before 8 a.m. or after 8 p.m. local time in the called person's time zone," and no more than three calls to a person in 24 hours "on the same subject matter or issue, regardless of the phone number used to make the call." Licensees are **not** exempt from this rule. Whether it reaches texts is unsettled; use the same window.	Fla. Stat. 501.616(6); 501.604(25)
Federal hours	Not before 8 a.m. or after 9 p.m., local time at the called party's location. In Florida, the stricter 8 p.m. applies.	64.1200(c)(1); 16 CFR 310.4(c)
Your name, first	Florida: your "true first and last names and the business on whose behalf" you are calling, "immediately upon making contact." Federal: the caller's name, the business, and a phone number or address.	501.059(2); 64.1200(d)(4)
Autodialed, prerecorded or AI voice	Marketing calls using an autodialer or an artificial or prerecorded voice need prior express written consent. AI-generated voices count (FCC 24-17, Feb 2024). Florida requires the same for any "automated system for the selection and dialing of telephone numbers or the playing of a recorded message."	64.1200(a)(2), (f)(9); 501.059(8)(a)
Ringless voicemail	A ringless voicemail to a cell phone is a call with an artificial or prerecorded voice. Consent is required.	FCC 22-85 (effective Nov 21, 2022)
FCC 26-67, effective Nov 25, 2026	For consent-based robocalls and robotexts, and calls made with signed permission, a revocation in reply to a marketing message revokes consent to all of that caller's future marketing calls and texts. Honor it within 10 business days. This replaces a delayed date of Jan 31, 2027. A caller that designates an exclusive way to opt out must disclose it clearly in the call or text.	64.1200(a)(10)–(11), as amended
Stops and lawsuits	Florida: actual damages or $500, whichever is greater, up to triple if willful. Before suing over texts, the person must reply STOP, and you have 15 days. Federal: a person who gets more than one violating call in 12 months may recover up to $500 per violation, trebled if willful.	501.059(10); 47 U.S.C. 227(c)(5)

Facebook v. Duguid (2021) narrowed what counts as an autodialer under federal law. It did not touch prerecorded or AI voices, Florida's broader "automated system" test, or the Do Not Call rules. A power dialer that picks and dials numbers for you may fall under Florida's test; ask your broker before you use one (our reading).

The simplest practice that keeps you inside all of it. A person places every call and every text, from a row that passed the scrub, between 8 a.m. and 8 p.m. the neighbor's time, at most three times in 24 hours, with "[first and last name] with [brokerage]" as the first words. Any "stop," in any words, ends everything that day. Holiday Networking, Lessons 2.4, 2.6 and 2.7, and AI in 2027's Autonomy Dial ("Outbound AI-voice calls to prospects: Off, unless you hold prior express written consent") say the same.

Avoid
"Drop a ringless voicemail on the whole street." · "I'll keep calling until I catch you."

Better
"I'll call the rows I'm allowed to call, myself, between 8 and 8, no more than three times in a day."

MODULE 2 LESSON 2.4

The door: the homeowner decides

Asking for a listing is commercial. Cities can make you get a permit, limit your hours and enforce "No Solicitation" signs against you.

Case	What the Supreme Court said
Martin v. City of Struthers, 319 U.S. 141 (1943)	Whether visiting is permitted depends "upon the will of the individual master of each household." A city "can punish those who call at a home in defiance of the previously expressed will of the occupant."
Breard v. City of Alexandria, 341 U.S. 622 (1951)	Upheld a ban on uninvited door-to-door solicitors: "We see no abridgment of the principles of the First Amendment in this ordinance."
Watchtower Bible & Tract Society v. Village of Stratton, 536 U.S. 150 (2002)	Struck down a permit rule for all canvassers, but said a rule limited to "commercial activities and the solicitation of funds" would arguably be tailored to the village's interests.

NEW IN THE LIBRARY · FLORIDA'S STATEWIDE SIGN, FLA. STAT. 501.062 (IN FORCE SINCE JULY 1, 2026)

"A person may not engage in commercial solicitation on any dwelling that clearly and prominently displays a sign" at least 8.5 by 11 inches, visible to anyone approaching, with letters at least 1 inch high, reading in substance: **"THIS DWELLING IS DESIGNATED PRIVATE PROPERTY. NO COMMERCIAL SOLICITATION IS PERMITTED PURSUANT TO SECTION 501.062, FLORIDA STATUTES."** "Commercial solicitation" means "attempting to sell goods or services … through direct or indirect contact with individuals, including, but not limited to, using words, body gestures, or signs, on behalf of a business or commercial entity." A first violation is a noncriminal violation; a second or later one is a second-degree misdemeanor. Created by ch. 2026-3, Laws of Florida (CS/CS/CS/SB 290), approved March 23, 2026.

Our reading: a posted 501.062 sign means no knock, no pitch and no hanger left at that door. The statute's purpose clause speaks of the owner's right to exclude unauthorized commercial solicitation once noticed (501.062(1)), but whether a hanger counts as "indirect contact" is untested; no court or Attorney General opinion was found. A small sign, or one that just says "No Soliciting," is not a 501.062 sign; a homemade sign that meets the size, letter-height and wording test is. City codes and *Martin* still apply to every "No Soliciting" sign. Skip those homes too.

Before you walk a street	What we found	Source
A state permit?	Florida's home-solicitation permit excludes those regulated by chapter 475, which covers real estate licensees.	Fla. Stat. 501.022(1)(b)6.
City rules	Example: Lighthouse Point (Broward County) bars solicitation at addresses that have said no, requires every solicitor to carry a city police ID card, allows 9 a.m. to 9 p.m., and bars Sundays and holidays without Commission approval. Read from the city's page, not the code; whether it exempts licensees was not verified.	lighthousepointfl.gov; City Code ch. 62
HOAs and gates	No statewide Florida rule was found. The community's declaration and rules, the gate and private-property law decide.	Not found

One phone call before you walk. Call the police non-emergency line or the city clerk: "Does a real estate agent need a solicitor permit or ID to knock doors here? Is there a no-solicitation registry? What hours?" Write down who answered and when. In an HOA, ask the manager for the solicitation rule. Never talk your way past a gate "to see a friend." Where knocking is barred, use stamped mail or a resident's invitation.

Avoid
"That 'No Soliciting' sign doesn't apply to me. I'm not selling anything."

Better
"I skip that house. My Circle Sheet says door: no."

MODULE 2 LESSON 2.5

Notes and hangers: at the door, never the mailbox, with your brokerage on every one

The mailbox rule is in Snail Mail in the Age of AI. The rest of this page is what a note, a hanger or an invitation must carry.

Nothing unstamped in, on or hanging from a mailbox. 18 U.S.C. 1725 fines anyone who "knowingly and willfully deposits any mailable matter … on which no postage has been paid, in any letter box" to avoid postage. The USPS manual adds that nothing without postage may be "placed upon, supported by, attached to, hung from, or inserted into a mail receptacle," and "Any advertising on a mailbox or its support is prohibited" (DMM 508.3.1.3, 508.3.2.5). Snail Mail (Dec 9, 2026), Lesson 2.1, has the detail; its Module 6 checklist covers anything you do mail.

What goes on every note, hanger and invitation	Rule	Source
The licensed brokerage name. "All advertising must be in a manner in which reasonable persons would know they are dealing with a real estate licensee. All real estate advertisements must include the licensed name of the brokerage firm."	If your own name appears, at least your last name as registered.	Fla. Admin. Code R. 61J2-10.025(1)–(2)
A QR code or RSVP page	On the internet, the brokerage name goes "adjacent to or immediately above or below the point of contact information." A QR code that opens an RSVP page puts that page under this rule.	61J2-10.025(3)(a)
A true picture	No advertising that is "fraudulent, false, deceptive, or misleading in form or content." NAR: present "a true picture," and show the firm name "in a reasonable and readily apparent manner."	Fla. Stat. 475.25(1)(c); NAR Article 12, SOP 12-5
"Sold"	"Only REALTORS® who participated in the transaction as the listing broker or cooperating broker (selling broker) may claim to have 'sold' the property."	SOP 12-7
Offers and inducements	Anything offered must come with a "clear, thorough, advance understanding of all the terms and conditions."	SOP 12-3
No paying neighbors for referrals (Florida)	A licensee may be disciplined for paying "a fee or other compensation to, a person not properly licensed … for the referral of real estate business."	Fla. Stat. 475.25(1)(h)

Someone else's sale is a market fact, not your sale: "A home on Heron Court closed this month (source: MLS)." We did not check MLS rules on printing another brokerage's sold data on a hanger; ask your MLS. A "$500 if your friend buys" offer to a neighbor is out in Florida. Holiday Networking, Lesson 2.8, covers gifts and RESPA.

Avoid
"I left it in your mailbox." · "JUST SOLD by us!" on another brokerage's deal.

Better
"I left it at your door." · "A home on Heron Court closed this month (source: MLS)." Brokerage name on the piece.

MODULE 2 LESSON 2.6

Fair housing on the street: the house, never the people

HUD's blockbusting rule names uninvited solicitations for listings, which is what circle prospecting is, as one way blockbusting happens. Keep every word about the house, the price and the market.

NEW IN THE LIBRARY · BLOCKBUSTING

It is unlawful "for profit, to induce or attempt to induce any person to sell or rent any dwelling by representations regarding the entry or prospective entry into the neighborhood of a person or persons of a particular race, color, religion, sex, handicap, familial status, or national origin" (42 U.S.C. 3604(e)). HUD's rule lists, among prohibited acts: "Engaging, for profit, in conduct (including **uninvited solicitations for listings**) which conveys to a person that a neighborhood is undergoing or is about to undergo a change" in those characteristics, and encouraging a sale through claims that such entry "can or will result in undesirable consequences," such as "a lowering of property values" or "a decline in the quality of schools." And "it is not necessary that there was in fact profit as long as profit was a factor for engaging in the blockbusting activity" (24 CFR 100.85). Florida says the same in Fla. Stat. 760.23(5).

So: the pitch is one sale and today's market, never who is moving in, the area "changing," or values about to fall.

Rule	What it covers at the door	Source
Statements and ads	Any "notice, statement, or advertisement" that indicates a preference, limitation or discrimination. HUD applies it to "all written or oral notices or statements," including flyers and signs. Spoken words on the step count.	42 U.S.C. 3604(c); 24 CFR 100.75(b); Fla. Stat. 760.23(3)
Expressing a preference	Expressing to "prospective sellers ... or any other persons a preference for or limitation on any purchaser."	100.75(c)(2)
Where you advertise	Choosing media or locations that "deny particular segments of the housing market information about housing opportunities" because of a protected class.	100.75(c)(3)
Steering	Telling a buyer they "would not be comfortable or compatible with existing residents" because of a protected class.	100.70(c)(3)
The owner's exemption ends with you	A single-family owner is exempt only if selling without "the sales or rental services of any real estate broker, agent, or salesman."	42 U.S.C. 3603(b)(1)
NAR Code (members)	Do not volunteer the "racial, religious or ethnic composition of any neighborhood," and do not engage in "any activity which may result in panic selling or steering." The Code adds sexual orientation and gender identity.	Article 10; SOPs 10-1, 10-3

NEW IN THE LIBRARY · "HELP CHOOSE YOUR NEW NEIGHBOR"

We found no HUD, DOJ, NAR or state guidance, and no case, on this line by name. **Our reading:** it invites neighbors to state a preference for a buyer (100.75(c)(2)), a preference the seller cannot act on once a broker is involved (3603(b)(1)). A neighbors-only look used as the only marketing could also deny others the information (100.75(c)(3)). The replacement: **"Know someone who'd love this street? Here's the listing. It's open to everyone."**

Schools or crime: HUD's letter of Apr 24, 2026 covers discussing them "with prospective homebuyers or renters," given "in an equal and consistent manner." A neighbor who might sell is not a buyer, and the blockbusting rule names crime and schools (24 CFR 100.85(c)(2)). Give everyone the same sourced pointer, no opinion, never tied to who is moving in. Run every invitation through the Fair Housing Firewall (Keeping AI Compliant, Sep 23, 2026).

Avoid
"The neighborhood is changing. Sell before values drop."

Better
"A home on your street just listed at [price]. Here's what's sold nearby (source: MLS)."

MODULE 2 LESSON 2.7

A neighbor listed with another broker gets the general invitation only

Knocking every door is a general canvass. Picking out the house with another broker's sign is not.

Article 16: "REALTORS® shall not engage in any practice or take any action inconsistent with exclusive representation or exclusive brokerage relationship agreements that other REALTORS® have with clients." **SOP 16-2** allows "general announcements to prospects," even if some recipients are listed elsewhere: "A general telephone canvass, general mailing or distribution addressed to all prospects in a given geographical area" is general. What is unethical is "telephone or personal solicitations of property owners who have been identified by a real estate sign, multiple listing compilation, or other information service as having exclusively listed their property with another REALTOR®," and targeted written solicitations of those owners. **SOP 16-4:** do not solicit a listing that is currently listed exclusively with another broker. **SOP 16-13:** deal with the client's broker, not the client, unless that broker consents or the client starts it.

You may
Say "I see you're listed with [broker]. I'm only letting neighbors know about the open house." Leave the same general invitation everyone gets. Answer general market questions. If *they* raise switching, SOP 16-6 lets you discuss terms that start when their current agreement ends. SOP 16-3 lets you offer an unrelated service, such as property management. They get what everyone gets, nothing more.

You may not
Critique their price or their agent. Offer a value estimate. Ask when the listing expires. Say "call me if it doesn't sell." Call or write to them because they are listed.

Pull active listings off any targeted list, as The Golden Handcuffs Conversation (Nov 18, 2026, Lesson 7.3) and The Expired Goldmine (Aug 12, 2026) teach. A home withdrawn for the holidays may still be under an exclusive agreement (page 9).

2.8 Your seller's confidences stay confidential

Rule	What it says	Source
Florida's default	"It shall be presumed that all licensees are operating as transaction brokers unless a single agent or no brokerage relationship is established, in writing, with a customer."	Fla. Stat. 475.278(1)(b)
Limited confidentiality	Prevents disclosure "that the seller will accept a price less than the asking or listed price," "of the motivation of any party for selling," of other financing terms, "or of any other information requested by a party to remain confidential." A single agent owes full confidentiality.	475.278(2)(f); (3)(a)3.
NAR	Do not "reveal confidential information of clients" unless they consent after full disclosure. Latent material defects are not confidential.	SOP 1-9
Access to the home	Do not "access or use, or permit or enable others to access or use, property on terms or conditions other than those established by the owner or seller."	SOP 1-16
Authority to advertise	"REALTORS® shall not offer for sale/lease or advertise property without authority."	SOP 12-4

What this means at the door. Even Florida's default relationship keeps the seller's motivation and price flexibility private. Get a written list of what you may say ("listed at [price], 3 bed, 2 bath, pool, open Saturday") and what you may not ("relocating," "divorce," "needs to close by," "flexible"). The seller signs it before the first knock. That list is System 1, The Seller's Yes.

Avoid
"The sellers are relocating, so they'll take less."

Better
"I can't share their plans, but I'm glad to tell you about the house."

MODULE 2 THE RULES ON ONE PAGE

The rules of the street on one page, then six situations to sort

Education, not legal advice. Your broker's policy, your MLS and your state's law come first. Florida rules shown.

Channel	The rule in one line	Source	Page
Phone or text	Scrub (national copy no more than 31 days old, plus Florida's list). A listed Florida number needs the signed box, a past client, or a request you are answering. 8 a.m. to 8 p.m., three calls in 24 hours at most, name and brokerage first, no robots without signed consent, any stop is final.	64.1200; 501.059; 501.616(6)	11
Door	The homeowner decides. A 501.062 sign or a "No Soliciting" sign means skip it. Check the city and the HOA first.	501.062; *Martin*; city code	13
Note or hanger	At the door, never in or on the mailbox. Licensed brokerage name on every piece.	18 U.S.C. 1725; 61J2-10.025	14
Your words	The house, the price, the market and the open times. Never who lives there, who might move in, or a street "changing."	3604(c), (e); 24 CFR 100.75, 100.85	15
Listed elsewhere	The general invitation only. No targeted call, letter or pitch.	Article 16; SOPs 16-2, 16-4	16
Your seller	Only what the seller approved in writing. Never motivation, timing or price flexibility.	475.278(2)(f); SOP 1-9	16
Claims	"Sold" only on your own deals. A source on every number. No paying neighbors for referrals.	SOP 12-7; 475.25(1)(h)	14

EXERCISE 2 · WHAT DOES THE RULE SAY?

Six situations, all sample data. For each, name the rule, then say what you do instead.

1. A home in the first ring has a laminated sign by the door: "THIS DWELLING IS DESIGNATED PRIVATE PROPERTY. NO COMMERCIAL SOLICITATION IS PERMITTED PURSUANT TO SECTION 501.062, FLORIDA STATUTES." You plan to tuck the invitation in the door handle without knocking.
2. It is windy, so you plan to put the invitations inside mailboxes "so they don't blow away."
3. Your data vendor's export says "DNC checked." You pulled it in October and plan to call from it on Jan 5.
4. You live three streets over. You have never met the owner of 11 Coral Vine, but "we're neighbors," so you plan to call without scrubbing.
5. Your texting tool can send "Just listed on Coral Vine! Reply YES for the price" to every number on the street at once.
6. A neighbor asks why your sellers are moving. Your seller told you it is a job transfer and that they would take less to close by March.

Answer key: Appendix A, page 39.

MODULE 2 REVIEW · ANSWER FROM MEMORY

1. Which reasons let you call a registered number federally, and which of them survive on Florida's list?
2. What are Florida's calling hours and call limit, and does the licensee carve-out cover a circle call?
3. What does a 501.062 sign require of you, and since when?
4. What does HUD's blockbusting rule name in parentheses, and what line replaces "help choose your neighbor"?

MODULE 3 LESSON 3.1

Nothing goes to a neighbor until the seller signs off

A one-page sign-off, made at the listing appointment, before the first knock. Five parts. The seller signs it; you file it.

BY THE END OF THIS MODULE YOU CAN

- Write a one-page Seller's Yes with its five parts
- Check the MLS clock before a neighbor hears about a home not yet live
- Offer the no-circle option, and honor it

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SHARE      what you may tell neighbors
PRIVATE    what never leaves the listing appointment
PORCH      whether to hold a neighbors' hour, and its terms
PATH       public, preview or private, and the MLS clock
NO-CIRCLE  the seller's right to say no to all of it
```

AI drafts it from the listing agreement with Prompt 1. The seller reads every line, signs and dates it. Nothing goes out until they sign.

Part	What goes on it	Why
1 · Share	List price, beds and baths, the features the seller wants mentioned, open-house times.	No advertising "without authority" (SOP 12-4).
2 · Private	Why they are selling, when they need to move, whether they would take less, financing terms, and anything else they ask you to keep quiet.	Fla. Stat. 475.278(2)(f), (3)(a)3.; SOP 1-9.
3 · Porch	Yes or no to a neighbors' hour. If yes: date and hours, who may come, seller present or not, photos, how many inside at once.	Access on the owner's terms (SOP 1-16); NAR safety tips.
4 · Path	Public, preview or private, with the seller's signed choice. If not yet live in the MLS: the compliance desk's written answer before any invitation.	Clear Cooperation; the Choice Record (Nov 11, 2026).
5 · No-circle	"I do not want any neighbor outreach about this listing." If ticked, nothing about it goes to the street.	The seller's choice (Nov 11 covers it).

3.2 The MLS clock

Under the Clear Cooperation Policy, "the listing broker must submit the listing to the MLS for cooperation with other MLS Participants within one (1) business day of marketing a property to the public." Public marketing "includes, but is not limited to, flyers displayed in windows, yard signs, digital marketing on public facing websites … digital communications marketing (email blasts)…" while "one-to-one, broker-to-broker communications about listings will not trigger CCP requirements" (NAR FAQ, May 21, 2025). The seller's signed path choice is the Choice Record in Private, Preview, or Public? (Nov 11, 2026).

WHAT WE FOUND NO RULING ON

NAR's list does not name open houses or door hangers, and we found no NAR or MLS statement on whether a neighbors-only preview of a home not yet in the MLS counts as public marketing. **Our reading:** hangers and printed invitations look like flyers, and a street-wide invitation is not one-to-one. Before you announce a preview of a home not yet live, ask your MLS compliance desk, in writing, whether it starts the one-business-day clock. If the home is already live, note the live date on the sheet.

Avoid
"I'll tell the neighbors this week and get the paperwork signed later."

Better
"Nothing goes out until you sign. Here is exactly what I may say, and what I never will."

MODULE 3 LESSON 3.3

The sheet itself, and what happens when the seller says no

Sample data. One page, five parts, each with a box the seller ticks or leaves blank. The form your broker uses comes first.

SAMPLE · THE SELLER'S YES FOR 14 CORAL VINE LANE, SAMPLE SHORES, FLORIDA (INVENTED)

Part	What the seller approved
1 · Share	☑ Listed at $615,000 ☑ 3 bedrooms, 2 baths, pool ☑ Roof replaced in 2024 ☑ Open-house times ☐ Interior photos on the invitation (seller: no)
2 · Private	☑ Why we are selling ☑ When we need to move ☑ Whether we would take less ☑ Financing terms ☑ Also private: our new address
3 · Porch	☑ Yes. Neighbors' hour Fri, Jan 8, 2027, 5–6 p.m. Anyone who comes is welcome. Seller not present. No photos by visitors. At most 10 people inside at once. A second agent from Sample Realty Group on site.
4 · Path	Public. Live in the MLS and sign up on Mon, Jan 4, 2027. Choice Record signed Dec 17, 2026. Nothing goes to neighbors before Jan 4, so the preview follows the MLS date and no compliance-desk question is needed. Public open house Sat, Jan 9, 1–4 p.m.
5 · No-circle	☐ "I do not want any neighbor outreach about this listing." (Not ticked.)
Signed	Seller A, Dec 17, 2026 · Jordan Lee, Sample Realty Group

Seller A, Jordan Lee, Sample Realty Group and Coral Vine Lane are invented for this book.

3.4 How AI helps, and where it stops

AI may	AI may not
Draft the five parts from the listing agreement and your appointment notes, with names removed (Prompt 1, page 43).	Decide what the seller agrees to, or tick a box.
Move anything about motivation, timing or price out of the share list and into the private list.	Put a reason for selling, a deadline or a price hint in the share list, even if it is in your notes.
Mark missing details NOT KNOWN.	Fill a gap with a guess, or give a legal opinion.

3.5 When the seller ticks no-circle

Some sellers want privacy: an illness, a divorce, a job nobody knows about yet, or simply no wish to be talked about. You do not need to know why, and you should not ask twice. When the box is ticked, mark the Circle Sheet "no circle" for this listing and stop: no knocks, calls, notes or invitations about this home. The seller's path choice comes first (Private, Preview, or Public?, Nov 11, 2026). Your general farm work that never mentions the listing is a separate matter; on our reading, ask the seller whether they are comfortable with your usual mail going out while their home is for sale.

Ask the seller one more thing. NAR's 2025 Profile found that 65% of sellers had already recommended their agent at least once since selling. Your seller is already talking to the neighbors. If they want to tell a neighbor about the listing themselves, that is their conversation, not your outreach. On our reading, it does not make that neighbor your acquaintance for the Do Not Call rules.

Avoid
Asking a privacy seller why, then trying to talk them into a neighbors' hour.

Better
"Understood. Nothing about your home goes to the street. I'll note it on the sheet today."

MODULE 3 EXERCISE 3

Share, keep private, or ask the seller

Ten things from a listing appointment, all sample data. Sort each one before you open the answer key.

EXERCISE 3 · WHERE DOES EACH ITEM GO?

Your listing is 14 Coral Vine Lane (sample). For each item, write **Share** (it can go on the share list once the seller ticks it), **Private** (it stays out of every script), or **Ask** (the seller must decide, in writing). Give one reason.

1. The list price, $615,000.
2. "We're moving because of a job transfer in March."
3. "We'd take $580,000 if it closes before March."
4. The roof was replaced in 2024.
5. A neighbors' hour on Friday, Jan 8, 5–6 p.m.
6. Letting visitors at the neighbors' hour take photos of the kitchen.
7. The seller's new address in another state.
8. A known leak under the kitchen sink that the seller has not fixed.
9. "Please don't tell the neighbors anything. We're very private."
10. Whether the seller will be at home during the neighbors' hour.

Answer key: Appendix A, page 40.

Before you read the key

Test	If yes
Would it tell a neighbor why the seller is selling, when, or for how little?	Private. Florida's limited confidentiality covers motivation and price flexibility (475.278(2)(f)).
Is it about who may come into the home, when, or what they may do there?	Ask. Access is on the owner's terms (SOP 1-16).
Is it a fact about the house that the seller wants buyers to know?	Share, once ticked (SOP 12-4).
Is it a defect?	Not a door-script item. SOP 1-9 says latent material defects are not confidential; how they are disclosed is a question for your broker.
Did the seller say no to all outreach?	No-circle. Stop there.

MODULE 3 REVIEW · ANSWER FROM MEMORY

1. Name the five parts of the Seller's Yes.
2. Which Florida statute keeps the seller's motivation and price flexibility private, and what is the default relationship?
3. When must you ask the MLS compliance desk before announcing a neighbors' hour, and why?
4. What happens on the Circle Sheet when a seller ticks no-circle?

MODULE 4 LESSON 4.1

One row per home: how you may reach it, and what you may say

Every home around the listing gets a row. The columns decide the channel from rules, not hunches. AI builds and refreshes the sheet. A person makes every call.

BY THE END OF THIS MODULE YOU CAN

- Build a Circle Sheet from the county parcel file and the MLS
- Fill each row's phone, door, note and flag columns from the rules in Module 2
- Keep AI to building and refreshing the sheet, while you make every call and knock

Column	What goes in it	Rule	Page
Home	Address from the county parcel file; first ring, street or next block; owner's mailing address if it differs.	—	—
Phone	The scrub result against the national registry and Florida's list, with the registry copy's date. Then the reason you may call: off both lists, signed permission, or a past client within 18 months. In Florida an acquaintance, or an inquiry alone, does not clear a registered number (501.059(1)(k), (4)). Otherwise **NO CALL**.	64.1200(c)(2), (f)(5); 501.059(1)(k), (4)	11
Door	A 501.062 sign or a "No Soliciting" sign? A city permit, ID or hours rule? An HOA or gate rule? Then **YES** or **NO**. Signs are checked on the walk; until then, NOT CHECKED.	501.062; city code; HOA	13
Note	**DOOR ONLY**, with the brokerage name; or **NONE**. Never the mailbox.	18 U.S.C. 1725; 61J2-10.025	14
Flags	**LISTED WITH ANOTHER BROKER**: general invitation only. **DO NOT CONTACT**: nothing, by any channel, and on your own do-not-call list the same day.	Article 16, SOP 16-2; 64.1200(d)	16
Script	DOOR, PHONE, GENERAL INVITATION ONLY or NONE. The approved scripts are in Module 5.	3604(c), (e); 24 CFR 100.85	26
Log	Date and what the person said about the house or their own plans, in their words. Never a guess about who they are.	Our rule	—

4.2 How big is the circle?

```
FIRST RING   the 8 nearest homes: 2 on either side, 4 across the street
THE STREET   every home on the listing's street
THE BLOCKS   3–4 surrounding blocks, if you have the hours
```

The first-ring definition is borrowed from one published study's research design (McCartney, Orellana-Li & Zhang, Journal of Finance, 2024). We use the definition only, not its findings.

Coaches differ on size. Tom Ferry starts with every home on the listing's street, then 3–4 surrounding blocks. The Close suggests keeping the circle to about 20–50 homes. Darryl Davis suggests knocking or calling 50–100 nearby homes. All three are practice advice, not measured results. Pick the size you can actually work in the days you have, and work it by geography only. Never choose rows by who lives in them.

Avoid
"Pull every number in the ZIP code and start dialing."

Better
"One listing, one street, one row per home, scrubbed and checked before anyone hears from me."

MODULE 4 LESSON 4.3

Building the sheet, and the scrub

Seven steps, in this order. Vendor tools can help with the list. Your own scrub and your own checks decide the columns.

Step	Do this	Why
1	Pull every address in the circle from the county parcel file, with the owner's mailing address.	An owner who lives elsewhere gets mail at the mailing address. Same Do Not Call and Article 16 rules.
2	Search the MLS for active listings in the circle, and homes recently taken off the market.	Flag them LISTED WITH ANOTHER BROKER until you know otherwise.
3	Add numbers only from a source your broker approves. Ask the vendor where its data comes from and how it handles opt-outs and privacy laws.	Homeowner lists carry legal risk (below).
4	Scrub every number against the national registry and Florida's list. Write the registry copy's date on the sheet.	No more than 31 days old on each call date. A copy dated Dec 15 or later covers calls through Jan 15.
5	Run your own do-not-call list over the sheet.	Requests are honored within 10 business days and kept 5 years. Do it the same day.
6	Call the city clerk or police non-emergency line; ask the HOA manager.	Their answers go in the door column.
7	Walk the street before the first knock and note any 501.062 or "No Soliciting" sign.	Door NO and note NONE for those homes.

Circle-list tools, as their own pages describe them

Tool	What the vendor's page shows (checked Nov 3, 2026)	Do Not Call handling, as stated
REDX GeoLeads and Power Dialer	Pin or boundary search; up to 3 phones and e-mail per contact; 2,500 leads a month (7,500 on PLUS). Prices conflict on the page: $60, $69.99 and $129.99 (PLUS) a month; CORE, $199, includes GeoLeads. Data sources not disclosed.	"Cross Checked Against DNC"; dialer advertises "DNC Protection."
Vulcan7 Neighborhood Search	Map targeting; filters include absentee owners, equity, length of ownership and "empty nesters"; a "Likely to List" score, method not shown. No prices shown.	"DNC filtering included."
Landvoice Neighborhood Search	Draw on the map; 3,000 results a month on every tier; owner name, address, up to 3 phones. $87, $127, $177 or $227 a month.	DNC numbers are "clearly indicated": flagged, not removed.
Mojo Dialer	"Neighborhood Lists" (not described further); dialer claims up to 300 calls an hour. No prices shown.	Not described on the pages read.

Vendor claims, not checked, not recommendations. None of these pages advertises AI that writes neighbor scripts.

THREE CAUTIONS

- **A vendor's flag is not your scrub.** Methods differ, and one flags numbers rather than removing them. The safe harbor needs your own procedures and a copy no older than 31 days.
- **Leave demographic filters off; dial by hand.** Choose the circle on a map. On our reading, an "empty nesters" filter picks households by whether children under 18 live there, which is familial status (24 CFR 100.20). Used to decide who gets an invitation, it can deny families with children information about a home for sale (100.75(c)(3)); for REALTORS®, Article 10 also applies. Clear any power dialer with your broker first (page 12).
- **Homeowner data has been to court.** On Nov 3, 2026, coleinformation.com showed its domain transferred to Atlas Data Privacy Corporation under a New Jersey court order (final default judgment Sep 19, 2025), on Daniel's Law claims by about 19,295 people. Page notice only.

MODULE 4 WORKED EXAMPLE

A Circle Sheet for one listing, filled in

Sample data. Jordan Lee's sheet for 14 Coral Vine Lane. Registry copy dated Dec 17: good through Jan 17.

SAMPLE · CIRCLE SHEET, 14 CORAL VINE LANE (INVENTED STREET, NO REAL PEOPLE)

Home	Ring	Phone	Door	Note	Flags · script
10 Coral Vine	1st	NO CALL. National registry; no reason.	YES	Door only	Door script
12 Coral Vine	1st	MAY CALL. Past client, closed June 2026 (runs to Dec 2027).	YES	Door only	Door and phone
16 Coral Vine	1st	MAY CALL. Off both lists (copy Dec 17).	YES	Door only	Door and phone
18 Coral Vine	1st	NO CALL. Florida list.	NO. 501.062 sign.	NONE	Skip
11 Coral Vine	1st	NO CALL. Listed with another broker.	YES	Door only	Listed elsewhere: general invitation only
13 Coral Vine	1st	NO CALL. Said "don't contact me," Oct 2026; on my list.	NO	NONE	DO NOT CONTACT
15 Coral Vine	1st	MAY CALL only to answer the value question (Nov 30 request). Signed box for more.	YES	Door only	Door; ask for the signed box
17 Coral Vine	1st	NO CALL until the signed box. Tennis partner, but registered: no Florida acquaintance exception.	NO. Small "No Soliciting" sign.	NONE	Signed box, in person
20 Coral Vine	Street	NOT KNOWN. No number on file.	YES	Door only	Door script
9 Coral Vine	Street	NO CALL. National registry (my scrub).	YES	Door only	Door script
19 Coral Vine	Street	NO CALL. Owner lives out of state; registered.	YES (tenant)	Door; stamped mail to owner	Door script
2 Heron Ct	Next block	MAY CALL. Off both lists (copy Dec 17).	NO. HOA rule (Dec 18).	NONE; stamped mail	Phone only

Sample city answer (Dec 18): no permit for licensees; knocking 9 a.m.–8 p.m. Yours will differ.

4.4 How Jordan decided the hard rows

- **12** is registered, but a June 2026 closing is within 18 months and a prior business relationship in Florida, so Jordan may call. **15** asked about value on Nov 30. Florida treats that as an express request, so Jordan may call to answer it, and asks for the signed box before anything else.
- **17** has a small "No Soliciting" sign, not a 501.062 sign. Jordan skips the door anyway. He knows the owner from tennis, but the number is registered and Florida's list has no acquaintance exception, so he asks for the signed box in person before any call.

What AI did, and did not do. Prompt 2 (page 43) turned Jordan's own results into this table and listed the NOT KNOWN cells. It looked nothing up, guessed nothing about anyone and decided no permission. Jordan checked five rows by hand.

MODULE 4 EXERCISE 4

Fill in seven rows yourself

Same listing, same registry copy (dated Dec 17), new homes. All sample data. Decide each column from the rules, not from a hunch.

EXERCISE 4 · PHONE, DOOR, NOTE, FLAGS

For each home, fill in Phone (MAY CALL with the reason, or NO CALL), Door (YES or NO), Note (DOOR ONLY or NONE) and any Flag. Assume no sign at the door unless one is mentioned.

1. **22 Coral Vine.** On the national registry. The owners bought through you in October 2024.
2. **24 Coral Vine.** Off both lists in the Dec 17 scrub. You plan to call on Jan 20.
3. **8 Coral Vine.** Another brokerage's For Sale sign is in the yard; it is active in the MLS.
4. **7 Coral Vine.** On the national registry. At your November open house nearby, the owner ticked, signed and dated the permission box and wrote this number in it.
5. **5 Coral Vine.** Told you in September: "Please don't contact me again."
6. **3 Coral Vine.** On the national registry. You have never met them, but they are your seller's best friend.
7. **1 Coral Vine.** Off both lists. It sits inside a gated section whose HOA rules bar solicitation.

Answer key: Appendix A, page 40.

	Phone	Door	Note	Flags
1				
2				
3				
4				
5				
6				
7				

4.5 Keeping the sheet alive

- **Re-scrub** before any call more than 31 days after the registry copy's date.
- **Same day:** any "stop," "don't call" or "don't come back" becomes DO NOT CONTACT, on this sheet and your own list.
- **New permission** from a sign-in card changes a row to MAY CALL, with the card's date.
- **Re-check the MLS** before each round: listings come and go.

MODULE 4 REVIEW · ANSWER FROM MEMORY

1. Name the columns of the Circle Sheet and what decides each one.
2. Why is a vendor's "DNC checked" not enough, and what date goes on the sheet?
3. What is the first ring, and where does the definition come from?
4. What does AI do on the Circle Sheet, and what does it never do?

MODULE 5 LESSON 5.1

The house, the price, the market and the open times. Nothing about people.

Every approved script talks about four things and never strays. That keeps you inside fair housing, your seller's confidentiality and Article 16 at once.

BY THE END OF THIS MODULE YOU CAN

- Build a door or phone script in four beats
- Answer the hard questions at the door without leaving the house as the subject
- Check an AI-written script line by line before your broker sees it

```
1 WHO AND WHAT  "[First and last name] with [brokerage]. I've just listed [address]."
2 THE INVITATION  the open times, and that it is open to everyone
3 THE REFERRAL   "Know someone who'd love this street? It's open to everyone."
4 LAST, THEIR PLANS one easy question; a no ends it, with thanks
```

Facts only from the signed Seller's Yes and your own sourced market pull. Under a minute out loud.

Coaches teach a similar order. Tom Ferry's open-house knock leads with the invitation and the referral question and asks about the neighbor's own move last (tomferry.com, Aug 31, 2026, paraphrased). Tom Toole, on Ferry's show, put the referral-first idea in one line: "Don't ask the homeowner themselves. Ask if they know anybody." That is coach advice, not data. We kept the order and changed the referral line to the fair-housing-safe version: you ask who would love the street, never whom they would like next door.

Talk about	Never talk about
The house: beds, baths and the features the seller approved	**People:** who lives on the street, who is buying, who might move in, who the home is "perfect for"
The price: the list price	**The seller:** why they are selling, when they must move, whether they would take less
The market: sales on the street, with the source and the date you checked	**Change and fear:** the area "changing," values about to fall, "now or never"
The open times: the neighbors' hour and the public open house	**Another broker's listing:** its price, its agent, when it expires

Why the line is drawn here. HUD's blockbusting rule names "uninvited solicitations for listings" (24 CFR 100.85), and spoken statements on the step count (24 CFR 100.75). Florida keeps the seller's motivation and price flexibility private (475.278(2)(f)). A neighbor listed elsewhere gets only the general invitation (SOP 16-2). Four topics, nothing else, is the simplest way to satisfy all of them. Say you are a licensed agent, and put the brokerage name on anything you leave.

Avoid
"Perfect for young families." · "Great for people like you." · "Help us choose your new neighbor."

Better
"Cul-de-sac lot, 3 bed, 2 bath, pool." · "Know someone who'd love this street? Here's the listing. It's open to everyone."

MODULE 5 LESSON 5.2

Two approved scripts, and the note for when no one is home

Sample wording for 14 Coral Vine Lane (invented). Approved facts only. Your broker approves your version before you use it.

THE DOOR SCRIPT (SAMPLE, ABOUT 45 SECONDS)

"Hi, I'm Jordan Lee with Sample Realty Group. I'm a licensed agent, and I've just listed 14 Coral Vine, three doors down. It's a three-bedroom, two-bath with a pool, listed at $615,000. We're holding a neighbors' hour this Friday, January 8, from 5 to 6, and it's open to everyone on Saturday from 1 to 4. Here are the details. There may be extra cars on the street Saturday, so thank you for your patience. Know someone who'd love this street? It's open to everyone. [Pause.] And if you'd ever like to see what's sold on Coral Vine in the past year, I'm glad to pull it for you. Thanks for your time."

THE PHONE SCRIPT (SAMPLE, ONLY FOR MAY CALL ROWS)

"Hi, this is Jordan Lee with Sample Realty Group. I'm calling because I've just listed 14 Coral Vine Lane, on your street. It's a three-bedroom, two-bath with a pool, listed at $615,000. We're holding a neighbors' hour Friday, January 8, from 5 to 6, and it's open to everyone Saturday from 1 to 4. Know someone who'd love the street? It's open to everyone. I can leave the details at your door, if that's easier. Thanks for picking up."

THE NOTE AT THE DOOR (SAMPLE)

"Sorry I missed you. I'm Jordan Lee with Sample Realty Group, and I've just listed 14 Coral Vine Lane. Neighbors' hour: Friday, Jan 8, 5–6 p.m. Open to everyone: Saturday, Jan 9, 1–4 p.m. Know someone who'd love this street? It's open to everyone." Printed with the licensed brokerage name and office contact. Left at the door, never in or on the mailbox.

Line	Why it is there	Rule or source
"Jordan Lee with Sample Realty Group"	First and last name and the business, first. Licensee identified.	501.059(2); 61J2-10.025(1)
"three-bedroom, two-bath … $615,000"	Only what the seller ticked on the Seller's Yes.	SOP 12-4; 475.278(2)(f)
"open to everyone on Saturday"	The neighbors' hour runs alongside full marketing.	100.75(c)(3) (our reading)
"extra cars on the street"	A courtesy, and Kyle Crawford's advice (Inman, Nov 3, 2026).	Coach advice
"Know someone who'd love this street?"	The referral line, about the street, not about who they want next door.	100.75(c)(2) (our reading)
"if you'd ever like to see what's sold"	Their own plans come last, as an easy offer. A no ends it.	Coach advice; The Close
"leave the details at your door"	No offer to text. A text needs a reason or signed permission.	64.1200(c)(2), (e)

Avoid
Going back to a door after a "no," or calling a row marked NO CALL "just this once."

Better
"No problem at all. Thanks for your time." Log it, and move on.

MODULE 5 LESSON 5.3

Special doors: what to say when...

The hard moments at the door are predictable. Each has a line that stays on the house.

When	Say	Why
The home is listed with another broker	"I see you're listed with [broker]. I'm only letting neighbors know about the open house." Hand over the same invitation. Nothing more.	Article 16; SOPs 16-2, 16-4, 16-13
They ask why your sellers are moving	"I'm not able to share their plans, but I'm glad to tell you about the house."	475.278(2)(f); SOP 1-9
They ask who is buying, or what kind of people are looking	"I can't speak to who's buying. Anyone is welcome to see it."	3604(c); 24 CFR 100.75; 100.85
They ask, "What's mine worth?"	First: "Are you working with an agent on your home right now?" If not: "I'd be glad to pull the recent sales on the street. May I call you about it? If so, would you tick and sign this box?" Log the date. In Florida, a call without the box answers only that question.	SOP 16-13; 501.059(1)(k)1.; 64.1200(f)(5)
They say "don't come back" or "don't call me"	"Understood. I'll make a note today." Mark DO NOT CONTACT on the sheet and your own list that day. Do not go back.	64.1200(d); The Close (coach advice)
They ask about schools or crime	Give everyone the same sourced pointer, and no opinion: "Here's where I'd look."	HUD letter, Apr 24, 2026 (buyers); 24 CFR 100.85(c)(2)
They ask whether the price will drop	"I can't speak for my sellers. Here's what's sold on the street in the past year (source: MLS)."	475.278(2)(f); Article 12
They offer to send friends "for a cut," or you are tempted to offer one	"That's kind. I can't pay for referrals, but I'd be grateful for an introduction." A thank-you note, not money.	Fla. Stat. 475.25(1)(h); Holiday Networking 2.8
There is a 501.062 or "No Soliciting" sign	Say nothing. Leave nothing. Walk on.	501.062; *Martin*
The street is gated or the HOA bars solicitation	Do not talk your way in. Stamped mail, or wait for a resident's invitation.	HOA rules; page 13
A tenant answers; the owner lives elsewhere	Give the tenant the general invitation. Reach the owner by stamped mail to the mailing address.	Page 22; Do Not Call still applies

A "no" is the end of that door, not the start of a pitch. The four beats end with one easy question about their plans, asked once. If the answer is no, thank them and walk on. The point of the visit was the invitation. Anything else is their choice, made on their own time, by the channel they gave you in writing.

Avoid
"If it doesn't sell with them, call me." (to an owner listed elsewhere)

Better
"I see you're listed with [broker]. I'm only letting neighbors know about the open house."

MODULE 5 WORKED EXAMPLE

An AI-drafted door script, run well

Sample data. Jordan drafts with Prompt 3, checks with Prompt 4, reads it aloud and sends it to the broker. Four steps, twenty minutes.

STEP 1 · THE INPUTS (FROM THE SIGNED SELLER'S YES, SAMPLE)

Approved facts: 14 Coral Vine Lane; 3 bed, 2 bath, pool; listed at $615,000; roof replaced 2024. Open times: neighbors' hour Fri, Jan 8, 5–6 p.m.; public open house Sat, Jan 9, 1–4 p.m. Market facts Jordan pulled himself: "Four homes on Coral Vine closed in 2026 (source: MLS, checked Dec 21, 2026)." Name and brokerage: Jordan Lee, Sample Realty Group. Nothing from the private list goes into the prompt at all.

STEP 2 · THE DRAFT (SAMPLE OUTPUT FROM PROMPT 3)

"Hi, I'm Jordan Lee with Sample Realty Group. I've just listed 14 Coral Vine, the home with the new sign. It's a three-bedroom, two-bath with a pool and a roof replaced in 2024, listed at $615,000. We're hosting a neighbors' hour Friday, January 8, from 5 to 6, and the public open house is Saturday from 1 to 4. Know someone who'd love this street? It's open to everyone. And if you're ever curious, four homes on Coral Vine closed in 2026; I'm happy to share what I found. Thanks so much."

LISTED-ELSEWHERE VERSION: beats 1 and 2, then "I see you're listed with [broker]. I'm only letting neighbors know about the open house." NOT KNOWN: none.

STEP 3 · THE CHECK (SAMPLE OUTPUT FROM PROMPT 4, THEN JORDAN BY HAND)

Check	Result	Jordan's fix
Name and brokerage first	PASS	None
Anything about people, change or who the home suits	PASS: none	None
Seller's confidences	PASS: none	None
Claims and numbers	FLAG: "this year" does not match the approved fact ("in 2026") and would be wrong in January	Changed to "in 2026"; the handout says "source: MLS, checked Dec 21, 2026"
Listed-elsewhere version	PASS	None
Fear, urgency, predictions	PASS: none	None
Mailbox; automated texts; inducements	PASS: none	None
Sounds like Jordan	"Hosting" and "thanks so much" are not how he talks	Changed to "holding" and "thanks for your time"

STEP 4 · ALOUD, THEN THE BROKER

Jordan reads it aloud twice: 42 seconds. He runs it through the Fair Housing Firewall (Keeping AI Compliant, Sep 23, 2026) and e-mails it to his broker with the Seller's Yes attached. The broker approves it on Dec 22 (sample). It goes on the Circle Sheet as the approved door script.

What made it work. The prompt held only approved facts, so the draft could not leak a confidence. The check flagged the one number that needed a source. Jordan changed two words to sound like himself. Nothing was dialed, texted or sent by AI.

MODULE 5 LESSON 5.4

A door script that is fluent, friendly and wrong

What a general AI tool can produce from "write a persuasive door-knocking script for my new listing, and make it create urgency." Find the problems before you read the table.

Sample, written for this course. *"Hi neighbor! I'm Jordan. You've probably seen the sign at #14. The sellers are relocating for work, so they're very motivated, and I've got a waiting list of buyers. Lots of young families are looking at this street right now, and I'd love your help choosing who moves in next door! With so many new people coming in, the street is changing fast, and homes like yours may never be worth more than they are today. JUST SOLD: 9 Heron Court, by our team! I'll leave a flyer in your mailbox."* ***At #11, listed with another brokerage:*** *"If it doesn't sell with them, I'm the one to call."* ***Suggested follow-up:*** *"Then text every number on the street: 'Just listed on Coral Vine! Reply YES for the price and your home's value!'"*

Eleven problems. Find them before you read on.

#	The line	What is wrong	Page
1	"Hi neighbor! I'm Jordan."	No last name, no brokerage, no "licensed agent." Name and brokerage come first.	12
2	"relocating for work, so they're very motivated"	The seller's motivation is confidential (475.278(2)(f); SOP 1-9).	16
3	"a waiting list of buyers"	A claim Jordan cannot back up. Not a true picture (Article 12).	14
4	"Lots of young families are looking"	A statement about who the buyers are, tied to familial status (3604(c); 100.75).	15
5	"your help choosing who moves in next door"	Invites a preference for a buyer (100.75(c)(2)), our reading.	15
6	"so many new people coming in … the street is changing fast"	Change in who lives on the street, used to encourage a sale: the blockbusting pattern (3604(e); 24 CFR 100.85).	15
7	"may never be worth more than they are today"	Fear and a prediction with no source. Panic selling (SOP 10-1).	15
8	"JUST SOLD: 9 Heron Court, by our team!"	In this sample, another brokerage sold it. SOP 12-7.	14
9	"I'll leave a flyer in your mailbox"	18 U.S.C. 1725; DMM 508.3.1.3. The door only.	14
10	"If it doesn't sell with them, I'm the one to call"	Soliciting an owner listed with another broker (Article 16; SOP 16-4).	16
11	A "Reply YES" text to every number on the street	In Florida, an automated marketing text needs prior express written consent (501.059(8)(a)). Federally it does too if the tool is an autodialer, which after *Duguid* depends on the tool, so ask your broker. Texts count as calls ((e)); there was no scrub; and from Nov 25, one "stop" to a consent-based marketing text ends all of that sender's marketing texts and robocalls (FCC 26-67).	12

What the eleven have in common. Every line sounds friendly and confident. Each line is untrue, not allowed, or both. AI wrote persuasive copy because it was asked to persuade. Ask it for the four beats from approved facts instead (Prompt 3), check it (Prompt 4), and a person reads every line before anyone hears it.

MODULE 5 EXERCISE 5

Keep it, fix it, or cut it

Ten lines an agent might say at a door on Coral Vine Lane, all sample wording. The four beats and the four topics decide most of them.

EXERCISE 5 · KEEP, FIX OR CUT

For each line, write Keep, Fix (and your version) or Cut (and why).

1. "Hi, I'm Jordan Lee with Sample Realty Group. I've just listed 14 Coral Vine."
2. "Help us choose your new neighbor!"
3. "The street's changing. Now's the time to get out before prices slip."
4. "The sellers are relocating, so there's room on price."
5. "It's perfect for a young family."
6. "We sold 9 Heron Court last month," about a home another brokerage sold.
7. "I'll leave this in your mailbox."
8. "Know someone who'd love this street? It's open to everyone."
9. To an owner listed with another broker: "I'd price yours differently, you know."
10. "Have you ever wondered what yours might be worth? I'm happy to pull the recent sales."

Answer key: Appendix A, page 41.

5.5 Practicing without a script in your hand

- **Say the four beats aloud** five times before your first door. Time it: under a minute.
- **Practice the special doors** from page 27 with a colleague playing the neighbor. Swap roles.
- **Use Appendix D**, 25 lines that stay on the house, to build your own version in your own words.
- **Never improvise a fact.** If a neighbor asks something you don't know, "I'll find out and leave it at your door" is the right answer.

MODULE 5 REVIEW · ANSWER FROM MEMORY

1. Name the four beats of the script, in order, and the four topics it may cover.
2. What do you say at the door of an owner listed with another broker, and what do you never say?
3. What do you say when a neighbor asks who is buying, and why?
4. Name five of the eleven problems in the fluent-but-wrong script, with the rule each one breaks.

MODULE 6 LESSON 6.1

A neighbors' hour that runs alongside full marketing, never instead of it

One hour at the listing for the people who live around it, then the public open house. Run safely, fairly and on the seller's written terms.

BY THE END OF THIS MODULE YOU CAN

- Prepare a neighbors' hour: the seller's terms, the MLS answer and a fair-housing-checked invitation
- Run it safely, with a sign-in card that asks permission the right way
- Follow up only with people who said yes in writing, inside the January calendar

```
BEFORE  the seller's written terms · the MLS answer, if not live · a checked invitation
DURING  NAR's safety tips · a second person · the sign-in card with a separate permission box
AFTER   follow up only with ticked boxes · Jan 4–15 · nothing Dec 23–Jan 1
```

The neighbors' hour is a courtesy to the street. The public open house follows, so everyone gets the same chance to see the home.

What practitioners suggest (coach advice, not data). Darryl Davis (Inman, Jul 31, 2026) recommends a neighbors-only showing in the first week or two after the listing goes live, before the public open house, framed as a courtesy, with the owners away. Kyle Crawford (Inman, Nov 3, 2026) walks the street a few days before, without pitching, and keeps neighborhood information about the property, not the people. The Close (2025) includes a short neighbor-only "sneak peek" invitation. NAR's own safety guidance suggests telling a neighbor you will host an open house and asking them to keep an eye and ear open. We found no study of how neighbors-only open houses perform.

Before the hour: the checklist	Source	Done
The seller ticked "yes" to a neighbors' hour and wrote its terms: date, hours, who may come, seller present or not, photos, headcount	Seller's Yes, part 3; SOP 1-16	☐
If the home is not yet live in the MLS: the compliance desk's written answer on whether the invitation is public marketing	Clear Cooperation; page 18	☐
The public open house is scheduled, and the invitation says so	100.75(c)(3), our reading	☐
The invitation passed Prompt 4 and the Fair Housing Firewall, and your broker approved it	Page 32	☐
A second person is booked for the whole hour	NAR safety tips	☐
The seller has put away valuables, keys, cards, jewelry and prescription drugs	NAR safety tips	☐
Sign-in cards printed, with the separate, unticked permission box	Page 33	☐

Avoid
"Exclusive neighbors-only sneak peek before anyone else can see it!"

Better
"Neighbors' hour on Friday, then open to everyone Saturday." Only after the seller's yes and, if needed, the MLS check.

MODULE 6 LESSON 6.2

The invitation: one card, for every door, that says it is open to everyone

Sample wording. The same card goes to every door the Circle Sheet allows, including the home listed with another broker.

SAMPLE · THE INVITATION (INVENTED LISTING)

You're invited to a neighbors' hour at 14 Coral Vine Lane.
Friday, January 8, 2027, 5–6 p.m. · Then open to everyone: Saturday, January 9, 1–4 p.m.
3 bedrooms, 2 baths, pool. Listed at $615,000.
Know someone who'd love this street? Bring them, or pass this on. It's open to everyone.
There may be extra cars on Coral Vine on Saturday. Thank you for your patience.
Jordan Lee · **Sample Realty Group** (licensed brokerage name and office contact) · QR code to the listing page, with the brokerage name beside the contact details.

On the card	Why	Source
The licensed brokerage name; Jordan's last name as registered	All real estate advertising	61J2-10.025(1)–(2)
The brokerage name next to the contact details on the QR page	Internet advertising	61J2-10.025(3)(a)
"Then open to everyone," with the public date	The hour runs alongside full marketing	100.75(c)(3), our reading
"Know someone who'd love this street?"	The referral, about the street	Replaces "help choose your neighbor"
No people in the artwork; a photo of the house or the street	Fair housing applies to imagery too	Neighborhood Famous (Sep 16, 2026)
No "exclusive," no "before anyone else"	May read as public marketing, and as the only access	Clear Cooperation; 100.75(c)(3)
Delivered to the door, never in or on the mailbox	Unstamped matter	18 U.S.C. 1725

6.3 Delivering it

Tom Ferry suggests knocking 2–5 days before the open house (coach advice). In this book's calendar, that is Mon–Thu, Jan 4–7, after the quiet week. Follow the Circle Sheet row by row: knock where the door column says yes, leave the card at the door where the note column says door only, and skip every NONE. Where the HOA bars knocking, stamped mail is the route. Calls go only to MAY CALL rows, 8 a.m. to 8 p.m., using the approved phone script.

Who pays for the cards and the coffee. Sharing the cost of a neighbors' hour or an open house with a lender, title company or local business is the subject of a planned session, Split the Bill (Jan 6, 2027). We do not teach it here. Until then, take any such offer to your broker before you accept it.

Avoid
A different, "special" card for the house listed with another broker, or no card at all.

Better
The same card for every door the sheet allows. General means general (SOP 16-2).

MODULE 6 LESSON 6.4

During the hour: safety first, and a card that asks permission

NAR's own safety tips, then a sign-in card whose permission box is separate, optional, unticked, signed and dated.

NAR safety tip ("56 Weekly Tips for REALTORS®," dated Mar 7, 2023)	What it means for the hour
"Inform a neighbor that you will be hosting an open house, and ask if he or she would keep an eye and ear open for anything out of the ordinary."	The neighbors' hour is the same idea, run with a guest list and a second person.
"Control your open house traffic by limiting the number of people allowed in the house at any given time. Police have reported groups of criminals that target open houses, showing up en masse near the end of the afternoon."	Use the seller's headcount. Ask the second person to hold the door when the house is full.
"Upon entering an open house property for the first time, check each room and determine at least two 'escape' routes."	Walk the house before 5 p.m.
Have sellers "hide any valuables in a safe place … remove keys, credit cards, jewelry … Also remove prescription drugs."	On the seller's checklist the day before.
"Don't assume that everyone has left the premises at the end of an open house. Have a colleague or buddy help you check all of the rooms and the backyard prior to locking the doors."	Sweep every room and the yard, together, before you lock.

SAMPLE · THE SIGN-IN CARD

Neighbors' hour · 14 Coral Vine Lane · Sample Realty Group

Name _____ Street (optional) _____

☐ **Optional.** Jordan Lee, Sample Realty Group, may text or call me at (_____) _____-_____ about homes on this street.

Signature _____ Date _____

Leave this box blank if you'd rather not hear from us. You're welcome either way.

Feature of the box	Why
Separate, optional and unticked; never required to come in	Florida counts the visitor "checking a box" as a signature (501.059(1)(h)2.). A box you tick for them, or one they must tick to come in, is not their choice.
Names Jordan and his brokerage, with the number the visitor writes in	The agreement must state that the consumer agrees to be contacted "by this seller" and include "the telephone number" (64.1200(c)(2)(ii)).
Signed and dated	The date starts your record. Keep the card. In Florida this box is the route for a registered number: an express request to be contacted (501.059(1)(k)1.).
Covers calls and texts you place yourself	It is not consent to autodialed, prerecorded or AI-voice messages. That needs a separate signed agreement that clearly authorizes them and says signing is not a condition of any purchase (64.1200(f)(9)(i); Fla. Stat. 501.059(1)(g)).

Sign-in apps exist. Curb Hero, for example, offers digital sign-in that works offline, dynamic QR codes and CRM links, sends the visitor a text with listing details at sign-in, and lists a no-cost plan for solo agents (vendor claims, checked Nov 3, 2026; not a recommendation). An app that texts visitors automatically is sending an automated text, which needs that separate consent. Check it with your broker.

Avoid
A pre-ticked box, or "By signing in you agree to receive texts."

Better
A separate, unticked box the visitor ticks, signs and dates, with their own number written in.

MODULE 6 LESSON 6.5

After: follow up only with people who ticked the box

The sign-in card decides who hears from you. The calendar decides when. You place every call and send every text yourself.

Question	Answer	Source
Who?	Only visitors whose box is ticked, signed, dated and has a number written in it. Everyone else: no call, no text. Neighbors who did not come keep their Circle Sheet row as it was.	64.1200(c)(2)(ii); 501.059(1)(h)
When?	Coaches suggest within 24–48 hours (Tom Ferry) or 24 hours (Darryl Davis). In this book's calendar: nothing Dec 23 to Jan 1. January follow-ups belong to Holiday Networking's January Callback, Jan 4–15. For a Jan 8 hour, that is Jan 9–15.	Coach advice; Holiday Networking (Dec 2, 2026)
What?	What you promised, and what they asked about: for example, the sales on their street with the source and date. Davis suggests a street market report and the last three sales (coach advice). Never anything about who they are.	Article 12; our rule
How?	A person places each call or sends each text, 8 a.m. to 8 p.m. their time, at most three calls in 24 hours, first and last name and brokerage first. Our practice: treat any "stop," in any words, as a stop on everything, that day.	501.616(6); 501.059(2); FCC 26-67
Then?	Update the Circle Sheet: new permissions with the card date, DO NOT CONTACT flags, inquiries with their date. Tell your seller how the hour went.	Page 24

A FOLLOW-UP TEXT, WRITTEN AND SENT BY THE AGENT (SAMPLE)

> *"Hi, this is Jordan Lee with Sample Realty Group. Thanks for coming by 14 Coral Vine on Friday. You asked what sold on Heron Court in 2026: two homes, at $598,000 and $640,000 (source: MLS, checked Jan 11). Happy to talk any time. Reply STOP and I won't text again."*

Sample figures, invented for this example. The opt-out line is our practice, not a quoted requirement.

NOT A FOLLOW-UP

- Adding every sign-in to a text drip. Only ticked, signed boxes, and only messages you send yourself.
- A "Reply YES" blast to the street after the hour. Automated marketing texts need prior express written consent in Florida (501.059(8)(a)), and federally if the tool is an autodialer (page 12).
- Calling the neighbor who did not tick the box because "they seemed interested." Their row says what it said before.
- Texting on Dec 28 because the hour happened on Dec 19. Move it to Jan 4–15.

Avoid
"Load everyone who signed in into the auto-texter."

Better
"Six boxes ticked. I'll call or text each one myself between Jan 9 and Jan 15."

MODULE 6 EXERCISE 6

Go, fix it, or stop

Six Front Porch situations, all sample data. The checklist on page 31 and the card on page 33 decide most of them.

EXERCISE 6 · GO, FIX OR STOP

For each: go ahead, fix it (say how), or stop and check first (say with whom).

1. Your listing is "coming soon" and not yet in the MLS. You plan to hand printed invitations to a neighbors-only preview on Friday.
2. The invitation reads: "Exclusive neighbors-only sneak peek, before anyone else can see it!"
3. Your sign-in card has one line at the bottom: "☑ Yes, text me about homes," already ticked.
4. Twenty people arrive in the last ten minutes. You are alone.
5. A visitor left a number but did not tick the box. Your CRM has already added them to a text drip.
6. Your neighbors' hour was Saturday, Dec 19. You scheduled follow-up texts for Monday, Dec 28.

Answer key: Appendix A, page 41.

6.6 When the seller wants something different

The seller says	What you do
"I want to be there and meet the neighbors."	It is the seller's home and the seller's terms (SOP 1-16). Write it on the Seller's Yes. Davis's advice to keep owners away is coach advice, not a rule.
"Only invite the people I like."	Then it is not a neighbors' hour. Every door the Circle Sheet allows gets the same card, and the public open house follows (100.75(c)(3), our reading).
"Can we skip the public open house?"	Then the path has changed. Go back to the Choice Record (Nov 11, 2026) and the MLS clock before anything goes out.
"No neighbors' hour after all."	Untick part 3, date it, and tell the street nothing about a preview.

MODULE 6 REVIEW · ANSWER FROM MEMORY

1. What three things must be in place before you invite anyone to a neighbors' hour?
2. Name four of NAR's open-house safety tips.
3. What makes the sign-in card's permission box valid, and what does it not cover?
4. Who gets a follow-up, when, and who places it?

MODULE 7 LESSON 7.1

Thirty days, Dec 16 to Jan 15

Build in December. Keep the quiet week. Walk, host and follow up in January, when listings jump.

BY THE END OF THIS MODULE YOU CAN

- Run all three systems from Dec 16, 2026 to Jan 15, 2027
- Keep Holiday Networking's quiet week and January Callback
- Keep score with three counts you control

When	Do this	Done means
Wed, Dec 16 today	Pick the listing: one you have now, or your next one. Draft its Seller's Yes with Prompt 1. Ask your broker for registry access and the written Do Not Call policy.	A draft, and a date with your seller
Thu–Fri, Dec 17–18	Walk the seller through the Seller's Yes; they sign. If the home will not be live in the MLS before the neighbors' hour, ask the compliance desk in writing. Call the city clerk; ask the HOA.	A signed sheet on file; the city's answer logged
Fri–Mon, Dec 18–21	Build the Circle Sheet with Prompt 2: parcel file, MLS, scrub with the copy date, your own list, reasons to call. Do Exercises 3 and 4.	Every row has phone, door, note and flags
Mon–Tue, Dec 21–22	Draft the scripts (Prompt 3), check them (Prompt 4), draft the Front Porch kit (Prompt 5). Send all of it to your broker. Print the cards. Do Exercises 5 and 6.	Approved scripts; printed cards
Wed, Dec 23 – Fri, Jan 1	Holiday Networking's quiet week: no knocks, calls or texts. Nothing goes out.	—
Mon, Jan 4	The listing is live (sample). Re-check the MLS for new listings in the circle. Re-scrub if the copy will be more than 31 days old on any call date.	Sheet refreshed
Mon–Thu, Jan 4–7	Walk the street: knock where the sheet says yes, cards at the door, calls only to MAY CALL rows, 8 a.m. to 8 p.m.	Every allowed row reached once
Fri, Jan 8	The neighbors' hour: second person, headcount, sign-in cards, sweep before you lock. Saturday's public open house follows.	Cards collected; house locked
Sat–Fri, Jan 9–15	Follow up only with ticked, signed boxes, inside the January Callback. Update the sheet. On Fri, Jan 15, count.	Follow-ups made; sheet updated

KEEP SCORE ON THESE THREE COUNTS

CIRCLE SHEET ROWS DECIDED, WITH A COPY DATE

DOORS REACHED BY THE RULES: KNOCKS, CARDS, ALLOWED CALLS

FOLLOW-UPS MADE, EVERY ONE TO A SIGNED BOX

Those are the only targets in this book. There is no conversion target and no listing count, because we found no independent study that gives one. If you want a number of your own, set it and call it a goal, not a forecast.

MODULE 7 LESSON 7.2

Things that will go wrong, and what to re-check

Every one of these is normal. Each has a fix.

Symptom	Likely cause	Fix
The seller won't sign before the holidays	Too much at once	Sign parts 1, 2, 4 and 5 now; part 3 in January. Nothing goes out until it is signed.
Half the street is NO CALL	Normal. Many numbers are registered.	The door and the card do the work. NO CALL is not "no contact."
The scrub copy is too old by the time you call	Holidays	Re-scrub on Jan 4. Write the new copy date on the sheet.
The city clerk doesn't know	A common answer	Ask the police non-emergency line, and log who said what, and when.
The AI draft mentions families, change or the seller's plans	It was asked to persuade, or saw your notes	Delete the line. Prompt 3 gets approved facts only.
A neighbor is annoyed you knocked	Normal	"Understood. I'll make a note." DO NOT CONTACT, that day.
Nobody ticks the box	Normal	Nothing to fix. They saw the house, and they know your name.
You missed the January window	Life	The rows keep. Use the sheet for your next listing on the street.

RE-CHECK BEFORE YOU RELY ON IT

- ☐ **NAR's 2026 Profile of Home Buyers and Sellers.** Not published as of Nov 3, 2026. If it is out by the session, replace the 2025 figures. Checked on: _____
- ☐ **The 2027 NAR Code of Ethics**, if adopted, was not posted on Nov 3, 2026. Check Article 16, SOPs 1-9, 10-1, 12-7 and 16-2 against it. Checked on: _____
- ☐ **FCC rules.** FCC 26-67 took effect Nov 25, 2026; a companion proposal takes reply comments until Dec 28, 2026. No petition was found in the Federal Register through Nov 3 (FCC filings not checked). Checked on: _____
- ☐ **Your registry copy date, your city's answer, your HOA's rule and your MLS's answer.** Each is local and can change. Checked on: _____
- ☐ **Vendor features and prices**, if you use a tool. Every one here is as displayed on Nov 3, 2026. Checked on: _____

The honest promise. None of this guarantees a listing, and we are not promising one. What it gives you is a way of working: your seller knows exactly what the street hears; you reach each home only the way your sheet allows; every word at the door is about the house, the price, the market and the open times; and the neighbors' hour is planned for safety, open to everyone, and followed up only with people who said yes in writing. The curious neighbor is more likely to remember your name.

ASSESSMENT COURSE STANDARD

Can you do these fourteen things?

Nobody is marking this but you. Tick only what you could do tomorrow, on a doorstep or in front of your broker, without this book open.

✓	I can…	Module
☐	Explain what Irwin & Livy found, and say “more likely,” never “will”	1
☐	Quote NAR’s 2025 Profile on one agent and on referrals correctly, including what it bundles together	1
☐	Say what no study has measured about circle prospecting, and decline to quote a conversion rate	1
☐	Decide whether I may call or text a neighbor: the scrub, the copy date and a reason that applies to that list	2
☐	Keep Florida’s 8-to-8 window, the three-call limit and my name first, and keep robots off without signed consent	2
☐	Recognize a 501.062 sign, and check city, HOA and gate rules before I walk a street	2
☐	Leave every note at the door with the brokerage name, and claim “sold” only for my own deals	2
☐	Explain blockbusting, and replace “help choose your neighbor” with a line that is open to everyone	2
☐	Give a neighbor listed with another broker the general invitation and nothing more	2
☐	Get a five-part Seller’s Yes signed before any neighbor hears about the listing	3
☐	Build a Circle Sheet in which every cell comes from a rule, with AI organizing and me deciding	4
☐	Deliver the four-beat script, and handle the special doors without leaving the house as the subject	5
☐	Run a neighbors’ hour with NAR’s safety tips and a valid, separate permission box	6
☐	Follow up only with signed boxes, inside Jan 4–15, and keep Dec 23 to Jan 1 quiet	6–7

My commitment

Item	My answer
The listing for this plan: address, or “my next listing”	
The date my seller signed the Seller’s Yes	
Circle Sheet: number of rows, and the registry copy date	
The city’s and the HOA’s answers: who answered, and when	
The date my broker approved the scripts and the card	
The neighbors’ hour and the public open house: dates and times	
Follow-ups made by Fri, Jan 15, every one to a signed box: number	
Who holds me to these dates	

The line to carry out of this book: The seller’s yes first. Every home, reached only the way the rules allow. The house, never the people. And the porch is open to everyone.

APPENDIX A | EXERCISES 1 & 2

Answer key: Exercises 1 and 2

Your wording will differ. Check it for the idea, not the words. This is education, not legal advice.

EXERCISE 1 (PAGE 10)

1. **Fix.** Say: "When homes nearby go on the market, neighbors become somewhat more likely to list too." The 11–15% is a relative increase, in one metro, from one study (Irwin & Livy, *Journal of Housing Research*, 2026).
2. **Fix.** NAR's 37% is friend, neighbor *or* relative, combined (2025 Profile, Exhibit 7-2). There is no separate number for neighbors.
3. **Keep**, with the source: 80% of sellers contacted only one agent (NAR 2025 Profile, Exhibit 7-3). "Be first" is a fair reading of it.
4. **Drop.** Baylor (2012) tested a random, unqualified list called by Keller Williams agents in November 2011, not circle prospecting. The author said the question may remain unanswered, called the results encouraging, and asked for more research. If you cite it: about 209 calls per appointment or referral.
5. **Drop.** Door-knock percentages come from vendors with no stated method. We found no independent study of door-knock or circle-prospecting conversion.
6. **Fix.** 61.8% is RE/MAX's 52-metro sample for January 2026. Realtor.com's national count, via FRED, rose 41.1%. Name the source with each figure.
7. **Drop.** The 2026 Profile was not published as of Nov 3, 2026. Quote the 2025 Profile and say which edition it is.

EXERCISE 2 (PAGE 17)

#	The rule	What you do instead
1	No commercial solicitation on a dwelling that displays the 501.062 sign. On our reading, that includes a hanger; whether a hanger is "indirect contact" is untested.	Skip the home. Door NO, note NONE on the Circle Sheet.
2	Nothing unstamped in, on or hanging from a mailbox (18 U.S.C. 1725; DMM 508.3.1.3).	Leave it at the door, weighted or tucked in, or hand it over.
3	The registry copy must be no more than 31 days old on the day of the call (64.1200(c)(2)(i)), and vendors' methods differ. Florida's list applies too.	Re-scrub through your broker before Jan 5. Write the copy date on the sheet.
4	Federally, a personal relationship means a family member, friend or acquaintance of the caller ((f)(17)), and living nearby is not one (our reading). In Florida there is no such exception at all (501.059(1)(k), (4)).	Scrub. If the number is registered, NO CALL. The door and the card do the work.
5	Automated marketing texts need prior express written consent in Florida (501.059(8)(a)), and federally if the tool is an autodialer. Texts count as calls ((e)). From Nov 25, 2026, one "stop" to a consent-based marketing text ends consent for all of that sender's marketing calls and texts (FCC 26-67).	Personal calls or texts you place yourself, only to MAY CALL rows.
6	Motivation and price flexibility are confidential (Fla. Stat. 475.278(2)(f); SOP 1-9).	"I'm not able to share their plans, but I'm glad to tell you about the house."

APPENDIX A | EXERCISES 3 & 4

Answer key: Exercises 3 and 4

Where more than one answer is defensible, the key says what makes the difference.

EXERCISE 3 (PAGE 20)

#	Where it goes	Why
1	Share, once ticked	The list price is a fact the seller wants buyers to know (SOP 12-4).
2	Private	Motivation and timing (475.278(2)(f)).
3	Private	Price flexibility and timing. Never in a script.
4	Share, if ticked	A feature of the house.
5	Ask	Part 3 of the Seller's Yes, in writing.
6	Ask	Access and use of the home are on the owner's terms (SOP 1-16).
7	Private	Not about the house. Keep it off the share list unless the seller says otherwise.
8	Not a door-script item	SOP 1-9 says latent material defects are not confidential. How they are disclosed is a question for your broker, not a talking point on the street.
9	No-circle	Tick part 5. Nothing about this listing goes to the street (Private, Preview, or Public?, Nov 11, 2026).
10	Ask	Part 3. Davis's advice to keep owners away is coach advice; the seller decides.

EXERCISE 4 (PAGE 24)

#	Phone	Door	Note	Why
1	NO CALL	YES	Door only	The October 2024 closing is more than 18 months before any January 2027 call. The relationship ended in April 2026. Registered, so no call. Knowing them personally does not help in Florida: its list has no acquaintance exception (501.059(1)(k), (4)).
2	Re-scrub first	YES	Door only	The Dec 17 copy covers calls through Jan 17. Jan 20 needs a fresh scrub; then MAY CALL if still clear.
3	NO CALL	YES	Door only	LISTED WITH ANOTHER BROKER: general invitation only (Article 16; SOPs 16-2, 16-4).
4	MAY CALL	YES	Door only	Signed, written permission that names the number (64.1200(c)(2)(ii)); in Florida, an express request ((1)(k)1.). Note the card's date.
5	NO CALL	NO	NONE	DO NOT CONTACT, on the sheet and your own list. Do not go back.
6	NO CALL	YES	Door only	Your seller's friend is not your acquaintance. Registered, so no call. The seller may tell them personally.
7	MAY CALL	NO	NONE at the door	Off both lists (copy Dec 17). The HOA bars solicitation, so no knock and no card at the door. Stamped mail if you want to reach them in writing.

APPENDIX A | EXERCISES 5 & 6

Answer key: Exercises 5 and 6

The four topics, the four beats and the Front Porch checklist decide most of these. Your broker's policy comes first.

EXERCISE 5 (PAGE 30)

#	Verdict	Why, and the better line
1	**Keep**	Name, brokerage, the listing. Beat 1.
2	**Cut**	Invites a buyer preference (100.75(c)(2), our reading). "Know someone who'd love this street? It's open to everyone."
3	**Cut**	Fear, a prediction with no source, and the "changing street" pattern (24 CFR 100.85; SOP 10-1).
4	**Cut**	The seller's motivation and price flexibility are confidential (475.278(2)(f)).
5	**Fix**	Describe the property, not the buyer: "Three bedrooms, two baths and a pool, listed at $615,000." (3604(c); 100.75)
6	**Fix**	"A home on Heron Court closed last month (source: MLS)." Only the listing or cooperating broker may claim "sold" (SOP 12-7).
7	**Fix**	"I'll leave this at your door." (18 U.S.C. 1725)
8	**Keep**	Beat 3, about the street, open to everyone.
9	**Cut**	Critiquing another broker's listing to its owner (Article 16; SOP 16-4). "I see you're listed with [broker]. I'm only letting neighbors know about the open house."
10	**Keep**	Beat 4, asked once, last. Never to an owner listed elsewhere. If they say yes, ask for the signed box and log the date.

EXERCISE 6 (PAGE 35)

#	Verdict	Why
1	**Stop**	Printed invitations may be public marketing that starts the one-business-day clock. Ask the MLS compliance desk in writing, and get the seller's signed path choice (Choice Record, Nov 11, 2026). Simplest: hold the hour after the listing is live.
2	**Fix**	"Neighbors' hour Friday, 5–6, then open to everyone Saturday, 1–4." No "exclusive," no "before anyone else."
3	**Fix**	A separate, optional, unticked box the visitor ticks, signs and dates, with their own number written in.
4	**Fix**	Limit how many are inside at once, as NAR advises; get a colleague there; sweep every room and the yard before you lock. Next time, book the second person for the whole hour.
5	**Stop**	Take them out of the drip today. No signed box, no follow-up. Automated marketing texts need prior express written consent in Florida (501.059(8)(a)), and federally if the tool is an autodialer.
6	**Fix**	Nothing Dec 23 to Jan 1. Move it to the January Callback, Jan 4–15, and only to ticked boxes.

WHAT THESE TWO EXERCISES SHOW

The fix is usually one line: say the street instead of the people, the house instead of the seller, the door instead of the mailbox, "open to everyone" instead of "exclusive." The ones to stop are those that reach people who did not say yes, or that announce a home before the MLS question is answered.

APPENDIX B KEEP THIS PAGE

The Circle Sheet reference card

One page for your clipboard. Florida rules shown; your broker, your MLS and your state come first.

SYSTEM 1 · THE SELLER'S YES

SHARE · PRIVATE · PORCH · PATH · NO-CIRCLE

Signed and dated before anyone hears about the listing. Never motivation, timing or price flexibility.

SYSTEM 2 · THE CIRCLE SHEET

PHONE · DOOR · NOTE · FLAGS · SCRIPT

One row per home. Every cell from a rule. AI builds it; a person makes every call.

SYSTEM 3 · THE FRONT PORCH

BEFORE · DURING · AFTER

Alongside full marketing, never instead. Open to everyone.

THE FOUR BEATS

1 Name and brokerage, the listing · **2** the invitation, open to everyone · **3** "Know someone who'd love this street?" · **4** last, one easy question about their plans; a no ends it.

THE CALENDAR

Dec 16–22 build · Dec 23–Jan 1 nothing goes out · Jan 4–7 walk · Jan 8 the hour (sample) · Jan 9–15 follow-ups, inside the January Callback.

THE PHONE COLUMN, IN THIS ORDER

1. On my do-not-call list, or DO NOT CONTACT? **NO CALL.**
2. Listed with another broker? **NO CALL**; general invitation only.
3. Off the national and Florida lists, copy no more than 31 days old on the call date? **MAY CALL.**
4. On a list, but signed permission or a past client within 18 months? **MAY CALL**, reason written. Outside Florida, on the national list only: an inquiry within 3 months or a real acquaintance also counts.
5. Anything else: **NO CALL.**

Then: a person dials · 8 a.m.–8 p.m. their time · 3 calls in 24 hours at most · first and last name and brokerage first · no autodialer, prerecorded or AI voice without signed consent · any "stop" is final, that day.

THE DOOR AND NOTE COLUMNS

- 501.062 sign or "No Soliciting": door NO, note NONE.
- HOA or gate bars it: door NO; stamped mail.
- City permit, ID or hours: follow them, and log the answer.
- Notes and cards: at the door, brokerage name, never the mailbox.

NEVER

Who lives there, who is buying, who might move in. · The street "changing." · "Help choose your neighbor." · The seller's reasons, timing or price. · A pitch to an owner listed elsewhere. · "Sold" on someone else's deal. · A "Reply YES" blast.

ALWAYS

The house, the price, the market, the open times. · A source and date on every number. · The brokerage name. · "It's open to everyone." · A second person at the hour. · Follow-up only to signed boxes. · Education, not legal advice: ask your broker.

APPENDIX C | PROMPTS 1 & 2

The six prompts

An AI tool your broker approved, training off, owners' names and numbers removed. AI drafts and organizes. It never dials, texts or sends, and never invents a fact about a neighbor.

Prompt 1 · The Seller's Yes Draft

```
Below are my listing terms and appointment notes, owners' names removed. Your goal is to draft a one-page
Seller's Yes for my seller to review and sign before any neighbor outreach. It is not to decide what my
seller agrees to, add terms, or give legal advice.

LISTING: [address, price, beds/baths, features the seller wants mentioned]
PATH: [public / preview / private] MLS LIVE DATE: [date or "not yet"]
WHAT THE SELLER SAID ABOUT NEIGHBORS: [their words]
OPEN HOUSE PLAN: [dates and times, or "none yet"]

Draft five parts, each line with a box to tick: 1. SHARE: facts from LISTING and OPEN HOUSE PLAN only. 2.
PRIVATE: why they are selling, when they must move, whether they would take less, financing, plus blank
lines. 3. PORCH: neighbors' hour yes/no; date, hours, who, seller present, photos, headcount. 4. PATH: the
path; if not yet live, "MLS compliance desk asked on ___, answer ___". 5. NO-CIRCLE: "I do not want any
neighbor outreach about this listing." End with signature and date lines.

RULES:
- Use only facts I gave you. If a detail is missing, write NOT KNOWN. Never fill in a guess.
- Anything about motivation, timing, price or money goes in part 2, never part 1.
- No legal conclusions; write "ask my broker". One page. Draft only: send, post or schedule nothing.

Then tell me to go through every line with my seller, have them tick, sign and date it, and file it before
any neighbor hears about the listing.
```

Prompt 2 · The Circle Sheet Builder

```
Below are the homes around my listing and the results of checks I ran myself. Your goal is a Circle Sheet,
one row per home, showing the channel each row allows based only on my results. It is not to look anything
up, add homes, guess anything about who lives anywhere, or decide a permission I have not recorded.

HOMES: [row ID, address, ring, owner mailing address same/different]
SCRUB (my broker's tool): [row ID: national Y/N, Florida Y/N; copy date]
MY REASONS: [row ID: past client closed DATE / inquiry DATE / signed permission DATE / acquaintance / none]
DOOR CHECKS: [row ID: sign Y/N/NOT CHECKED; city rule; HOA or gate rule]
FLAGS: [row ID: listed with another broker / do not contact] LAST CALL DATE: [date]

Make a table: row ID, address, PHONE (MAY CALL + reason + copy date, or NO CALL), DOOR (YES/NO + reason),
NOTE (DOOR ONLY / NONE), FLAGS, SCRIPT.

RULES:
- Do not contact: NO CALL, door NO, note NONE. Listed elsewhere: NO CALL, GENERAL INVITATION ONLY.
- MAY CALL only if off both lists (copy no more than 31 days old on my last call date), or for signed
permission or a past client within 18 months. On the Florida list, an inquiry or acquaintance is not
enough: write NO CALL, "ask for the signed box".
- Missing field: write NOT KNOWN in that cell. Never fill in a guess.
- Homes and rules only. Never add or infer names, ages, families, background, religion, health or anything
about people.
- A sheet only. Do not dial, text, e-mail or schedule anything.

Then list NOT KNOWN cells and rows whose copy will be too old; tell me to check five rows by hand.
```

APPENDIX C | PROMPTS 3 & 4

The script, and the check

Prompt 3 drafts from approved facts only. Prompt 4 flags problems; it does not decide what is legal.

Prompt 3 · The Door and Phone Script

```
Your goal is to draft a short door script and a short phone script for the neighbors of my listing, from the approved facts below. It is not to persuade anyone to sell, talk about the people on the street, or add facts.

APPROVED FACTS (SHARE part of my signed Seller's Yes): [paste]
OPEN TIMES: [neighbors' hour and public open house]
MY MARKET FACTS, WITH SOURCE AND DATE: [e.g. "4 homes on this street closed in 2026 (source: MLS, checked DATE)"]
MY FIRST AND LAST NAME AND BROKERAGE: [ ]

Four short beats: (1) "[my name] with [my brokerage]" and the listing; (2) the invitation, open to everyone; (3) "Know someone who'd love this street? It's open to everyone."; (4) last, one easy offer about their own plans; thanks if no. Add a version for a home listed with another broker: beats 1 and 2, then "I see you're listed with [broker]. I'm only letting neighbors know about the open house."

RULES:
- Only the house, the price, my market facts and the open times.
- Never who lives on the street, who is buying, who might move in, neighborhood change, or who the home is "perfect for". Never ask whom they would like as a neighbor.
- Nothing about my seller's reasons, timing or price.
- No facts beyond mine; no "sold" unless I marked a sale as mine. Missing fact: write NOT KNOWN. Never fill in a guess.
- No fear, urgency or predictions. Under 60 seconds. Draft only: send, post or schedule nothing.

Then tell me to read both aloud, run Prompt 4, and get my broker's approval.
```

Prompt 4 · The Street Check

```
Below is a script, note or invitation for the neighbors of my listing. Your goal is to flag anything to fix before my broker reviews it. It is not to rewrite it as a stronger sales message, or to decide what is legal.

THE TEXT: [paste] WHERE: [door / phone / note / invitation / follow-up]
APPROVED FACTS (SHARE part of my Seller's Yes): [paste]

Answer PASS, FLAG or NOT KNOWN for each, quoting the line:
1. First words give my first and last name and brokerage; printed pieces carry the licensed brokerage name.
2. Anything about people: who lives here, who is buying or might move in, neighborhood change, who the home suits. 3. The seller's motivation, timing, price flexibility or financing.
4. Any fact not in my approved facts, any number without source and date, any "sold".
5. Anything aimed at an owner listed elsewhere beyond the general invitation.
6. Fear, urgency or predictions. 7. A mailbox, an automated text, "reply YES", or ringless voicemail. 8. A gift or reward for referrals.
9. "Exclusive", "before anyone else", or anything suggesting the public cannot come.

RULES:
- Quote the exact words for every FLAG. If you cannot tell, write NOT KNOWN. Never fill in a guess.
- No legal conclusions; write "ask my broker". Send, post or schedule nothing.

Then remind me to run it through my Fair Housing Firewall and send it to my broker.
```

APPENDIX C | PROMPTS 5 & 6

The porch kit, and the follow-up list

Prompt 5 drafts what you print. Prompt 6 decides nothing on its own: it lists who signed, and drafts words you send yourself.

Prompt 5 · The Front Porch Kit

```
Your goal is to draft three things for a neighbors' hour at my listing: the invitation card, the sign-in
card, and a host checklist. It is not to add facts, make the event sound exclusive, or print, post or send
anything.

APPROVED FACTS AND PORCH TERMS (parts 1 and 3 of my signed Seller's Yes): [paste]
PUBLIC OPEN HOUSE: [date and time]
MY NAME AND LICENSED BROKERAGE NAME: [ ]
SAFETY TIPS I WILL FOLLOW: [paste from my broker or NAR]

1. INVITATION: the neighbors' hour, then the public open house; "Know someone who'd love this street? It's
open to everyone."; the licensed brokerage name; a line saying it is left at the door.
2. SIGN-IN CARD: name, and an optional street line. Then a separate, unticked, optional box: "You may text
or call me at ______ about homes on this street." with signature and date lines, and "Leave this box blank
if you'd rather not hear from us."
3. HOST CHECKLIST: the seller's terms, the headcount, the second person, and the safety tips I pasted, in
order: before, during, after.

RULES:
- Only facts and terms I gave you. If something is missing, write NOT KNOWN. Never fill in a guess.
- Never use "exclusive", "sneak peek before anyone else", "choose your neighbor", or anything about who the
home is for. No people in any image description.
- The permission box is never pre-ticked and never required to sign in.

Then tell me to check that the MLS answer is on file if the home is not yet live, and to send all three to
my broker.
```

Prompt 6 · The Follow-Up List

```
Below are the sign-in cards from my neighbors' hour, typed up with names replaced by card numbers. Your
goal is to list who I may follow up with and draft a short message for each, about what they asked me. It
is not to contact anyone, add people, or guess what anyone wants.

CARDS: [card #; box ticked Y/N; signed Y/N; dated Y/N; number written in the box Y/N; what they asked or
said, in their words]
MY NAME AND BROKERAGE: [ ]
MY FOLLOW-UP WINDOW: [e.g. Jan 9-15]

Make a table: card #, MAY FOLLOW UP (Y/N and why), a 2-3 sentence draft that starts with my first and last
name and brokerage.

RULES:
- Y only if the box is ticked, signed and dated with a number written in it. Everyone else: N, and no
draft.
- Drafts mention only what that person asked or said, and the house or the market. Never anything about who
they are. If I did not record what they asked, write NOT KNOWN. Never fill in a guess.
- Nothing dated Dec 23 to Jan 1. Calls 8 a.m. to 8 p.m. their time, at most three in 24 hours.
- If a card or note says stop, in any words, mark it N permanently.
- Do not send, schedule or dial anything.

Then tell me to check every Y row against the paper card, and to place each call or send each text myself.
```

APPENDIX D | PRACTICE SET

25 door and phone lines to practice on

Generic sample wording, not quotes. Every line is about the house, the market or the open times. Fill each blank only with an approved fact or something that really happened.

#	The line	When	Fill the blank with
1	“Hi, I’m ___ with ___. I’ve just listed the home at ___.”	Door, phone	Your first and last name, brokerage, the address
2	“It’s a ___ with ___, listed at ___.”	Door, phone	Approved facts from the Seller’s Yes
3	“We’re holding a neighbors’ hour on ___ from ___, then it’s open to everyone on ___.”	Door, note	The approved times
4	“Know someone who’d love this street? Here’s the listing. It’s open to everyone.”	Door, phone, note	Nothing. It stands alone.
5	“There may be extra cars on the street on ___. Thanks for your patience.”	Door, note	The open-house day
6	“Here’s what’s sold on ___ in the past 12 months, from the MLS, as of ___.”	Door, follow-up	The street; the date you checked
7	“If you ever want to see the recent sales on the street, I’m glad to pull them.”	Door, last	Nothing. Ask once.
8	“This is ___ with ___. I’m calling because I’ve just listed ___ on your street.”	Phone, first line	Name, brokerage, the address
9	“I can leave the details at your door, if that’s easier.”	Phone	Nothing
10	“No problem at all. Thanks for your time.”	After a no	Nothing. Then walk on.
11	“Understood. I’ll make a note today.”	After “don’t call” or “don’t come back”	Nothing. Then log it.
12	“May I call you about it? If so, would you tick and sign this box?”	When they ask about value	Nothing. Log the date.
13	“I see you’re listed with ___. I’m only letting neighbors know about the open house.”	Listed elsewhere	Their broker’s name, if they mention it
14	“I’m not able to share their plans, but I’m glad to tell you about the house.”	Asked why the sellers are moving	Nothing

How to use this list. Read three lines aloud a day until Dec 22. Fill each blank from your own Seller’s Yes and your own MLS pull, never from memory or a guess. Then write the four beats in your own words and run them through Prompt 4 (page 44).

APPENDIX D PRACTICE SET

25 door and phone lines, continued

Practice the hard doors out loud with a colleague, not by prompt.

#	The line	When	Fill the blank with
15	"I can't speak to who's buying. Anyone is welcome to see it."	Asked who is buying	Nothing
16	"I can't speak for my sellers. Here's what's sold nearby (source: ___)."	Asked if the price will drop	The source and date
17	"The neighbors' hour is the same house you'll see on ___."	Door	The public open-house day
18	"Sorry I missed you. The details are at your door."	Note	Nothing
19	"The ___ was replaced in ___."	Door, phone	An approved feature and year
20	"Here's the listing page. My brokerage's name is on it."	Door, card	Nothing
21	"I'll find out and leave the answer at your door."	A question you can't answer	Nothing. Then do it.
22	"This is ___ with ___, following up on the card you signed on ___."	Follow-up, first line	Name, brokerage, the date
23	"You asked about ___ at the open house. Here's what I found (source: ___)."	Follow-up	Their question; your source
24	"Thanks for coming by ___ on ___."	Follow-up	The address and day
25	"That's kind. I can't pay for referrals, but I'd be grateful for an introduction."	Offered a referral "for a cut"	Nothing

WHAT NEVER GOES IN THE BLANK

- Anything about who lives on the street, who is buying or who might move in.
- The seller's reasons, deadline or price flexibility.
- A number without a source and a date, or a prediction about prices.
- "Sold" on a deal you were not on as listing or cooperating broker.
- A fact you did not check, or one AI suggested.

Three short role-plays

The neighbor says	You practice
"Who bought the place across the street last year? Are the new ones going to be like them?"	Lines 15 and 4. Bring it back to the house and the open times.
"My cousin's an agent, but what do you think mine is worth?"	First ask whether they're working with an agent on their home (SOP 16-13). If not, line 12, and log the date. If they're listed, line 13 instead.
"Stop knocking on my door."	Line 11. DO NOT CONTACT, that day, on the sheet and your own list.

APPENDIX E | TAKE THIS WITH YOU

Questions for your broker, MLS and counsel

Several of these have no settled answer we could find. That is the reason to ask. Write down who answered, and when.

#	Question	Ask	Answer, who, date
1	Who holds our National Do Not Call registry access, for which area codes, and how do I get a scrub with the copy date?	Broker	
2	How do we scrub against Florida's quarterly list, and where is our written Do Not Call policy?	Broker	
3	Where do I log a "don't call" or "don't come back" said at the door, so every list honors it?	Broker	
4	Do door and phone scripts, notes and invitations need your approval before I use them? Who approves?	Broker	
5	Does a neighbors-only hour, a door hanger or a printed invitation for a home not yet in the MLS count as public marketing under Clear Cooperation?	MLS	
6	What may I print about another brokerage's sold data on a handout or hanger?	MLS	
7	Which form do we use for the Seller's Yes and the preview terms?	Broker, counsel	
8	Does leaving a hanger at a door with a 501.062 sign count as commercial solicitation?	Counsel	
9	Does Fla. Stat. 501.616(6), 8 a.m. to 8 p.m. and three calls in 24 hours, apply to texts?	Counsel	
10	Is our dialer an "automated system for the selection and dialing of telephone numbers" under 501.059(8)(a)?	Broker, counsel	
11	Our sign-in app texts visitors automatically. Does the permission box cover it?	Broker, counsel	
12	Where does our list vendor get its data, how does it handle opt-outs and privacy laws, and does it remove Do Not Call numbers or only flag them?	Broker, vendor	
13	Does a home taken off the market for the holidays remain "listed with another broker" for Article 16?	Broker	
14	Does [city] require a solicitor permit, ID or hours for licensees? Is there a no-solicitation registry?	City clerk, police	
15	What is [community]'s rule on solicitation and on notes left at doors?	HOA manager	
16	(Outside Florida) What are my state's Do Not Call, calling-hour, solicitation-sign, advertising and confidentiality rules?	Broker, counsel	

The honest default. Until someone answers in writing, treat a preview of a home not yet in the MLS, any automated text or dial, and any hanger at a signed door as "ask first." Nothing in this course is legal advice, and these rules vary by state.

APPENDIX F GLOSSARY

Glossary

Plain definitions for the terms in this book.

Article 16. The NAR Code article that bars actions inconsistent with another REALTOR®'s exclusive agreements. General canvassing is allowed (SOP 16-2); soliciting a listing held by another broker is not (SOP 16-4).

Blockbusting. Inducing a sale, for profit, by talking about people of a protected class moving into a neighborhood. 42 U.S.C. 3604(e); 24 CFR 100.85.

Circle prospecting. Reaching the homes around one listing: by door, note, call or invitation, within the rules.

Circle Sheet. System 2. One row per home: phone, door, note, flags and script, each decided by a rule.

Clear Cooperation. The NAR MLS policy that requires a listing to be submitted to the MLS within one business day of marketing it to the public.

Coach advice. Practice advice from a coach or trade outlet. Experience, not data.

Commercial solicitation. Under Fla. Stat. 501.062, attempting to sell goods or services through direct or indirect contact, on behalf of a business. Barred at a dwelling that displays the statutory sign.

Do Not Call Registry. The national list of numbers whose owners do not want telephone solicitations. Florida keeps its own list.

Established business relationship. Federal: a transaction with you within 18 months, or an inquiry within 3 months, not ended by a stop request. Florida: a prior or existing business relationship; an inquiry covers only a call answering it.

FCC 26-67. The FCC order, effective Nov 25, 2026, under which one revocation in reply to a consent-based marketing call or text ends consent for all of that caller's marketing calls and texts.

First ring. The eight nearest homes: two on either side, four across the street.

Front Porch. System 3. A neighbors' hour at the listing, before, during and after, alongside full marketing.

General canvass. A call, mailing or visit to every home in an area, not to owners picked because of their listing (SOP 16-2).

Limited confidentiality. The Florida transaction broker's duty not to disclose price flexibility, motivation, other financing terms or anything a party asks to keep private (475.278(2)(f)).

Neighbors' hour. A short open house for the people around the listing, followed by the public open house.

Personal relationship. For the federal Do Not Call list only: a family member, friend or acquaintance of the caller. Florida's list has no such exception.

Prior express written consent. A signed written agreement that clearly authorizes autodialed, prerecorded or AI-voice marketing to a stated number, and says signing is not a condition of any purchase.

Public marketing. Under Clear Cooperation: flyers in windows, yard signs, public websites, e-mail blasts and similar. One-to-one broker communication is not.

Ringless voicemail. A message dropped into voicemail without the phone ringing. A call that needs consent, per FCC 22-85.

Safe harbor. The FCC's protection for callers who keep written procedures, training, their own list and a registry copy no more than 31 days old.

Scrub. Checking every number against the national registry, Florida's list and your own list before calling.

Seller's Yes. System 1. The seller's signed sheet: share, private, porch, path, no-circle.

Steering. Restricting a buyer's choices by word or conduct based on a protected class. 24 CFR 100.70.

Vendor claim. A company's statement about its own product or data, not independently checked.

Working paper. A research paper posted before, or without, peer review.

On the exercises and worked examples. Coral Vine Lane, Heron Court, Sample Shores, Jordan Lee, Seller A, Sample Realty Group and every neighbor and figure in them are **sample data**, written so each idea fits on one page. Do not quote any of it as a statistic. Every source is listed on the next two pages.

APPENDIX F SOURCES

Sources

Checked Nov 3, 2026, unless noted. “Via” means we read a report of the source, not the source itself. Working papers, vendor claims and coach advice are labelled where they appear.

NEIGHBORS AND HOUSING DECISIONS

Irwin & Livy, “Close Competition: The Contagion Effect of Neighborhood Listings on Seller Motivation,” *Journal of Housing Research*, published online Oct 22, 2026, pp. 1–22, doi:10.1080/10527001.2026.2750578 (abstract read, via Crossref and OpenAlex). Earlier version: SSRN working paper 5336244, posted July 2, 2025.

Bayer, Mangum & Roberts, “Speculative Fever,” *American Economic Review* 111(2), 2021 (abstract), and NBER WP 22065, 2016 (magnitudes). McCartney, Orellana-Li & Zhang, *Journal of Finance* 79(2), 2024 (first-ring definition only). McCartney & Shah, Philadelphia Fed WP 21-16, 2021. Bailey, Cao, Kuchler & Stroebel, NBER WP 22258, 2016; *J. Political Economy* 126(6), 2018. Towe & Lawley, *AEJ: Economic Policy* 5(2), 2013.

NAR DATA

NAR, 2025 Profile of Home Buyers and Sellers (November 2025), Exhibits 3-1, 3-2, 3-4, 3-6, 4-6, 4-8, 6-17, 7-2, 7-3, 7-4, 7-7, 7-8, 7-9, 7-10 and Chapter 8; full report read from a member-distributed copy (Long Island Board of REALTORS®). No 2026 edition published as of Nov 3, 2026.

PROSPECTING AND SEASONAL DATA

Lampertz, “Has Cold Calling Gone Cold?”, Keller Center Research Report, Baylor University, Sept 1, 2012.

Vulcan7, “The State of Real Estate Prospecting in 2026” (vendor data through May 1, 2026; no publish date shown).

Realtor.com, Housing Inventory: New Listing Count, United States (NEWLISCOUUS) and Florida (NEWLISCOUFL), via FRED, St. Louis Fed; percentages are our arithmetic. RE/MAX National Housing Report for January 2026, via rei-ink.com.

PRACTICE (COACH ADVICE, PARAPHRASED)

Tom Ferry, “Real Estate Door Knocking Scripts for Open Houses,” tomferry.com, Aug 31, 2026. Tom Ferry, *Confidence & Conversion* Ep. 5, with Tom Toole, Feb 18, 2022 (the one direct quote).

The Close: Brittany Wrenn, circle prospecting, Jul 18, 2024, updated Jun 26, 2025; Sophia Doyle, door knocking, Apr 15, 2026; Gina Baker, Mike Ferry scripts, Aug 15, 2024, updated Dec 16, 2024.

Inman: Darryl Davis, Jul 31, 2026 and Aug 18, 2026; Kyle Crawford, “Open house tips for 2026,” Nov 3, 2026.

TOOLS AND DATA VENDORS (VENDOR CLAIMS; NOT RECOMMENDATIONS)

Product pages checked Nov 3, 2026: REDX GeoLeads and Power Dialer; Vulcan7 Neighborhood Search; Landvoice Neighborhood Search; Mojo Dialer and lead lists; Curb Hero. Door-knock conversion claims: Curb Hero (undated) and The Close (Apr 15, 2026); HousingWire, Mar 26, 2025.

coleinformation.com page notice (Atlas Data Privacy Corp. v. Cole Information Services, Inc., Superior Court of New Jersey, Essex County, ESX-L-007209-24); court records not pulled.

APPENDIX F | SOURCES, CONTINUED

Sources, continued

Rules change. Confirm the current text before relying on any of these. Florida rules are examples; other states differ.

PHONE AND TEXT

47 CFR 64.1200 (eCFR, version of Oct 30, 2026), incl. (a)(2), (a)(10)–(11), (c)(1)–(2), (d), (e), (f)(5), (f)(9), (f)(15), (f)(17). 16 CFR 310.2, 310.4. 47 U.S.C. 227(c)(5). FCC 22-85 (87 FR 76425, Dec 14, 2022). FCC 24-17 (Feb 8, 2024). FCC 26-67 (91 FR 67214, Oct 26, 2026) and the companion proposal (91 FR 67239). *Facebook, Inc. v. Duguid*, 592 U.S. 395 (2021).

Fla. Stat. 501.059, 501.603, 501.604(25) and 501.616(6) (2026 Florida Statutes, flsenate.gov).

DOOR, MAILBOX AND ADVERTISING

Martin v. City of Struthers, 319 U.S. 141 (1943); *Breard v. City of Alexandria*, 341 U.S. 622 (1951); *Watchtower Bible & Tract Society v. Village of Stratton*, 536 U.S. 150 (2002) (Cornell LII).

Fla. Stat. 501.062 (created by s. 24, ch. 2026-3, Laws of Fla., CS/CS/CS/SB 290, effective July 1, 2026) and 501.022. City of Lighthouse Point, solicitation page (City Code ch. 62).

18 U.S.C. 1725; USPS DMM 508.3.1.3 and 508.3.2.5. Fla. Admin. Code R. 61J2-10.025; Fla. Stat. 475.25(1)(c), (1)(h).

FAIR HOUSING, ETHICS, CONFIDENTIALITY, MLS AND SAFETY

42 U.S.C. 3603(b)(1), 3604(c), 3604(e); 24 CFR 100.70, 100.75, 100.85 (eCFR, version of Oct 30, 2026); Fla. Stat. 760.23(3), (5). HUD FHEO Dear Colleague Letter, Apr 24, 2026 (opening pages), and Cooley's summary, May 6, 2026.

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NAR, Multiple Listing Options for Sellers (effective March 25, 2025) and FAQ (May 21, 2025). NAR, "56 Weekly Tips for REALTORS®" (PDF dated Mar 7, 2023), linked from NAR's safety tips page.

THE LIBRARY

Edmund's Mastermind: Prospecting in the AI Age (May 13, 2026); The Expired Goldmine (Aug 12, 2026); The Coming-Soon Machine (Aug 19, 2026); Neighborhood Famous (Sep 16, 2026); Keeping AI Compliant (Sep 23, 2026); Private, Preview, or Public? (Nov 11, 2026); The Golden Handcuffs Conversation (Nov 18, 2026); AI in 2027 (Nov 25, 2026); Holiday Networking (Dec 2, 2026); Snail Mail in the Age of AI (Dec 9, 2026). Planned: Split the Bill (Jan 6, 2027).

Dated on purpose. This edition uses sources available on Nov 3, 2026. The readings of rules we label as ours are this course's judgment, not agency language, not legal advice and not a safe harbor. Products and prices are dated examples, not recommendations. Confirm your own state's rules with your broker or counsel.

To Your Next Listing,
Edmund Bogen

Because Ignoring the Neighbors is NOT an Option!