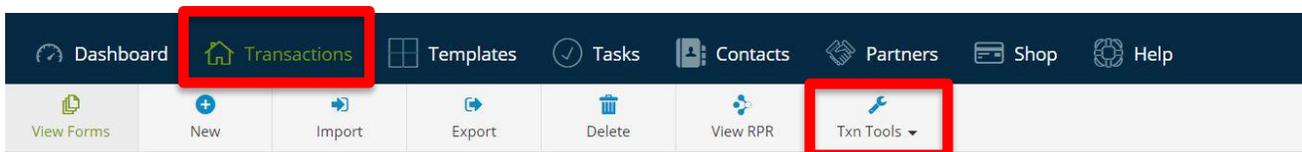


**Forms Advisor™** is an online software program that identifies which C.A.R. Standard Forms you need for your transaction. In addition, this rules-based tool creates the transaction in zipForm® Plus with the recommended forms, reducing the time spent on creating a transaction. Forms Advisor™ includes C.A.R. FormsTutor®, which provides a choice of audio or text instructions for completing the forms, including a legal Q&A component. These zipForm® features offer users a total solution for forms training and correct form usage instruction. Both Forms Advisor™ and FormsTutor® are FREE C.A.R. member benefits.

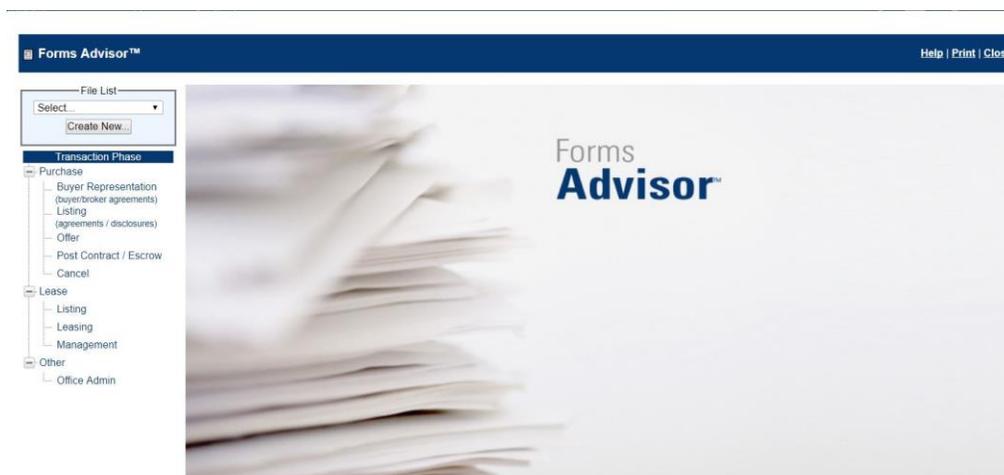
Using Forms Advisor™ is easy. The user enters transaction information into Forms Advisor™, such as the type of transaction (residential, multi-unit, probate, etc.), which party the agent represents, and other transaction-specific information. Forms Advisor™ directs the user to the relevant forms for that specific transaction. The process is fast and simple to use.

To access Forms Advisor™, open zipForm® Plus and go to the **Transactions** page. Then click on the **Txn Tools** drop-down menu.



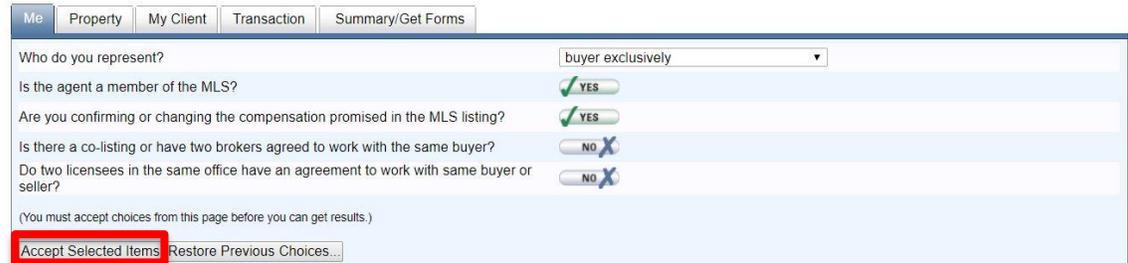
From the drop-down menu, select Form Advisor™  
Once selected, the Forms Advisor™ screen will appear.

- Clause Manager
- Lookup Field Manager
- Mortgage Calculator
- Forms Advisor**
- Forms Tutor



- Transaction Phase**
- [-] Purchase
  - Buyer Representation (buyer/broker agreements) Listing (agreements / disclosures)
  - Offer
  - Post Contract / Escrow
  - Cancel
- [-] Lease
  - Listing
  - Leasing
  - Management
- [-] Other
  - Office Admin

On the left of the screen are the **Transaction Phases** that can be selected, choose the appropriate transaction type that best describes your deal.



Me Property My Client Transaction Summary/Get Forms

Who do you represent?

Is the agent a member of the MLS?  YES

Are you confirming or changing the compensation promised in the MLS listing?  YES

Is there a co-listing or have two brokers agreed to work with the same buyer?  NO  X

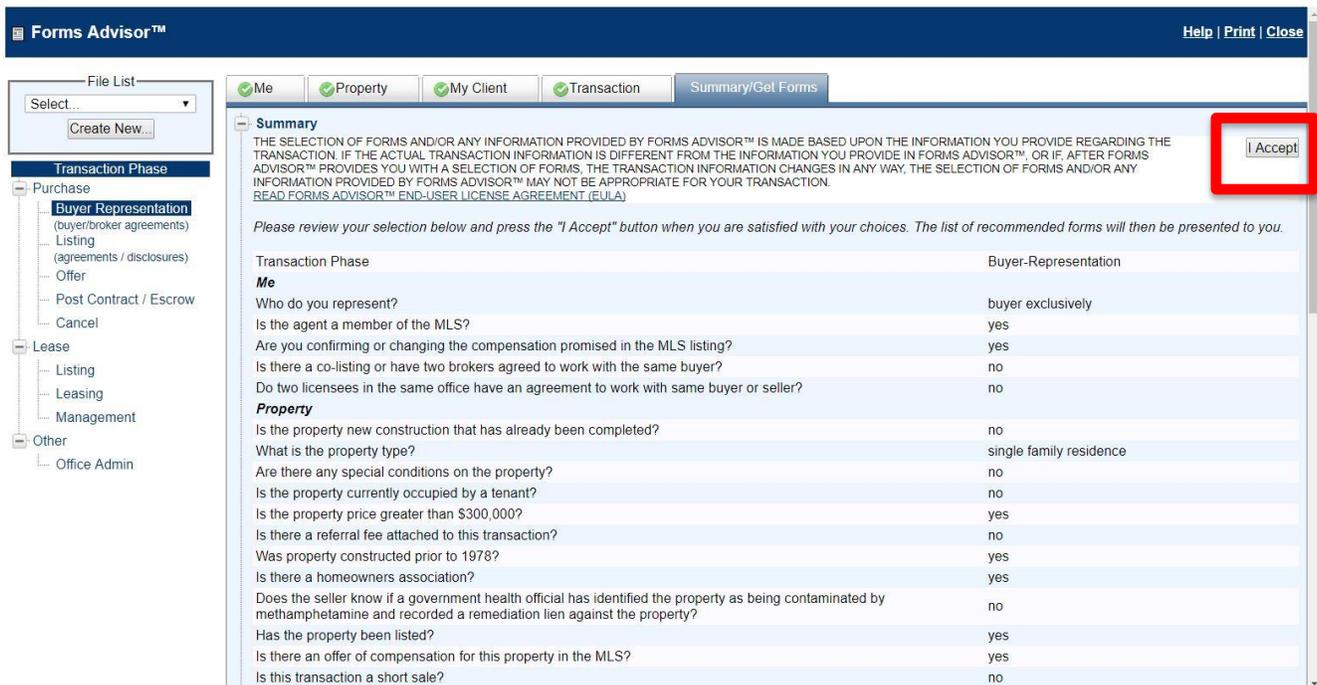
Do two licensees in the same office have an agreement to work with same buyer or seller?  NO  X

(You must accept choices from this page before you can get results.)

**Accept Selected Items** Restore Previous Choices...

Once **Transaction Phase** is selected, answer the question that describes your transaction you are working on. Then click **Accept Selected Items**.

Once Transaction Phase is selected, answer the question that describes your transaction you are working on. Move through each tab to answer questions about the Property, your Client, and the Transaction. Click **Accept Selected Items** at the bottom of each of these pages. Once all the selected terms have been accepted, press the **I Accept** icon on the Summary Page, and enter a transaction name if prompted. To view the list of recommended forms for this transaction, expand the section called Get Recommended Forms.



Forms Advisor™ Help | Print | Close

File List: Select... Create New...

Transaction Phase: Purchase, Buyer Representation, Listing, Offer, Post Contract / Escrow, Cancel; Lease, Listing, Leasing, Management; Other, Office Admin

Me Property My Client Transaction Summary/Get Forms

**Summary**

THE SELECTION OF FORMS AND/OR ANY INFORMATION PROVIDED BY FORMS ADVISOR™ IS MADE BASED UPON THE INFORMATION YOU PROVIDE REGARDING THE TRANSACTION. IF THE ACTUAL TRANSACTION INFORMATION IS DIFFERENT FROM THE INFORMATION YOU PROVIDE IN FORMS ADVISOR™, OR IF, AFTER FORMS ADVISOR™ PROVIDES YOU WITH A SELECTION OF FORMS, THE TRANSACTION INFORMATION CHANGES IN ANY WAY, THE SELECTION OF FORMS AND/OR ANY INFORMATION PROVIDED BY FORMS ADVISOR™ MAY NOT BE APPROPRIATE FOR YOUR TRANSACTION. READ FORMS ADVISOR™ END-USER LICENSE AGREEMENT (EULA)

Please review your selection below and press the "I Accept" button when you are satisfied with your choices. The list of recommended forms will then be presented to you.

Transaction Phase	Buyer-Representation
<b>Me</b>	
Who do you represent?	buyer exclusively
Is the agent a member of the MLS?	yes
Are you confirming or changing the compensation promised in the MLS listing?	yes
Is there a co-listing or have two brokers agreed to work with the same buyer?	no
Do two licensees in the same office have an agreement to work with same buyer or seller?	no
<b>Property</b>	
Is the property new construction that has already been completed?	no
What is the property type?	single family residence
Are there any special conditions on the property?	no
Is the property currently occupied by a tenant?	no
Is the property price greater than \$300,000?	yes
Is there a referral fee attached to this transaction?	no
Was property constructed prior to 1978?	yes
Is there a homeowners association?	yes
Does the seller know if a government health official has identified the property as being contaminated by methamphetamine and recorded a remediation lien against the property?	no
Has the property been listed?	yes
Is there an offer of compensation for this property in the MLS?	yes
Is this transaction a short sale?	no

**I Accept**

The list of recommended Forms can be applied to a new transaction or an existing transaction that you have already created by clicking the appropriate box at the bottom of the list. For more information about a particular form using Forms Tutor, click on the link to Forms Tutor next to the forms that have a Forms Tutor icon. You can also link to additional information on each form or Preview the form by clicking on the icons in the Link to Q & A or Preview columns.

✓	BRE	Buyer Rep. Agreement - Exclusive - 12/17			
✓	EBC1	Estimated Buyer Costs 1 - 4/06			
✓	ESD required	Exempt Seller Disclosure - 12/16			
✓	FLD required	Lead-Based Paint and Lead-Based Paint Hazards - 11/10			
✓	HOA 1	Homeowner Association Information Request - 11/14			
✓	HOA 2	Charges for Required Homeowner Association Documents - 12/17			
✓	HOA 3	Charges for Non-Statutory Homeowner Association Documents - 11/14			
✓	MCA	Market Conditions Advisory - 11/11			
✓	NIP	Notice of Identified Properties - 4/09			
✓	PRMB	Possible Representation of More than One Buyer - Disclosure and Consent			
✓	PSD	Parking and Storage Disclosure - 12/17			
✓	QS	Qualified Substitute Declaration of Possession of Transferor's Affidavit of Nonforeign Status - 4/09			
✓	RA	REALTOR'S Acknowledgement - 7/06			
✓	SPQ	Seller Property Questionnaire - 12/16			
✓	TC	Transaction Checklist - 1/06			
✓	WFA	Wire Fraud Advisory - 12/17			
✓	WHSD required	Water Heater and Smoke Detector Statement of Compliance - 11/10			
Select/Clear All		Create New Transaction   Apply to Existing...			

Forms Advisor™ is a great risk management tool for REALTORS® as it offers the user direction, instruction and legal information specific to a transaction. Forms Advisor™ integrates seamlessly with zipForm® Plus and is also accessible via zipForm® Standard.