



Membership Policies and Procedures

May 2025

The following sets forth a summary of the policies and procedures for members in the Charlotte Regional Realtor® Association (Association) and the Carolina Multiple Listing Services, Inc. (Canopy MLS). More details can be found in the [Association](#) and [Canopy MLS bylaws](#), "[Canopy MLS Rules and Regulations](#)," and other rules that may be adopted by the Association and Canopy MLS.

The Bylaws of the Association and Canopy MLS as well as the Canopy MLS Rules and Regulations, this policy document and any Association and Canopy MLS forms or applications (all available online at www.CanopyRealtors.com) may be amended from time to time with or without notice to you. Any amendment, change or modification to any of these documents shall be effective and enforceable.

Promise Not to Sue

Every Realtor® (referred to herein as either "Realtor®" or "Member") for and in consideration of his or her right to invoke arbitration proceedings and to initiate complaints under the Code of Ethics, irrevocably waives and releases any claim or right of action the Member may have or acquire against the Association or any of its officers, directors or Members, for any act performed in connection with the business of the Association and, particularly, as to the acts of the Association or any of its officers, directors, or Members taken in approving or not approving, advancing, suspending, expelling or otherwise disciplining the Association Member. Further, as a condition of membership in the Association, Members expressly waive any cause of action or claim for libel, slander or defamation that might arise from the filing or consideration of any ethics complaint or arbitration request. In addition, Members are prohibited from taking legal action against another Member for alleged violations of the Canopy MLS Rules and Regulations unless the complaining Member has first exhausted the remedies provided therein.

Membership (Association/Canopy MLS)

All individuals who maintain a valid real estate broker's, salesperson's or property management license or who are licensed or certified by an appropriate state regulatory agency to engage in the appraisal of real property and join the Association, receive an individual membership to the Association, the North Carolina Realtors® (the "NCR") and the National Association of Realtors® (the "NAR"). All active real estate and appraisal licensees join the Association as either a Realtor® or Designated Realtor® (the "DR") member. The DR is, for Association purposes, considered the head broker supervising all real estate licensees affiliated with an office of a real estate firm (usually the broker-in-charge (the "BIC") but not required to be the BIC). Realtor® membership moves with a licensee from firm to firm. A Realtor® who decides to open a new firm must reapply for membership as the DR (See New Company section below).

Each firm office must designate one Realtor® who shall be responsible for all the duties and obligations of membership including the obligation to arbitrate. The DR must be a sole proprietor, partner, corporate officer or branch office manager acting on behalf of the firm's principal(s) and must meet all other qualifications for Realtor® membership established in Article V, Section 2 of the Bylaws.

Participation in Canopy MLS is offered to each office of a real estate firm through the Member Participant (the "MP") of that office location. The MP is typically the DR or BIC of the office. All licensees affiliated with the MP access the MLS service by subscribing through the MP's membership. These individuals are referred to as Subscribers. For this reason, licensees who leave an office and move to another office within that firm or to a new firm, may have their Canopy MLS services inactivated until they transfer to another office location within their firm or re-affiliate with a new firm and subscribe to the service through their new MP.

Canopy MLS "Start-Up Fees" are fees charged to the MP of each office within a firm, to activate that office location's MLS service. Canopy MLS Start-Up Fees are significantly higher than the "Subscription Fees" paid by Subscribers to gain individual access to the MLS. When a Subscriber with a broker's or property management license, who has been designated as a BIC by the North Carolina Real Estate Commission (the "NCREC"), chooses to open up his or her own firm office and work independently, Canopy MLS Start-Up Fees will apply.

Canopy MLS provides one MLS office ID to each MP upon payment of the Start-Up Fee. In addition, the MP must pay quarterly MLS service fees (the "MP MLS Service Fees") as described in the Fee Schedule section herein. Canopy MLS also provides an additional MLS subscription for each individual employed by or affiliated as an independent contractor (including licensed and certified appraisers, and appraisal trainees) with the MP who has access to and who utilizes the MLS service. All Subscribers affiliated with an MP must pay an initial Subscription Fee and pay all applicable quarterly MLS service fees as described in the Fee Schedule section herein ("Subscriber MLS Service Fees"). Canopy MLS will assess a Category I violation to any MP who has not ensured that each licensee affiliated with his/her office either subscribes to Canopy MLS or has qualified for a Canopy MLS waiver (see below).

NOTE: Failure of an MP to ensure that all licensees affiliated with the MP's office apply to Canopy MLS upon affiliation, is a Category I violation. A Category I Non-Compliance fine will be assessed if the appropriate paperwork is not received within one week of notification.

MLS Waivers

Except in instances where a waiver is granted as noted below, all active real estate licensees, including but not limited to those who are part of a real estate team or who represent buyers exclusively, licensed or certified appraisers and appraisal trainees affiliated with an MP must subscribe to the MLS.

Application for a waiver requires the signature of that licensee's MP. Waivers are valid for one year and must be renewed. If, after written notification, the MP does not submit a waiver renewal form within two weeks of notification that a waiver renewal is due, a category I Non-Compliance fine will be assessed to that MP.

While on waiver from Canopy MLS, any licensee found to be using the MLS in any capacity, including, but not limited to, co-listing with a Subscriber, will be activated and assessed Subscriber MLS Service Fees back to the initial date of the violation of this waiver policy, along with any applicable Subscription Fees and may be also be fined. When Canopy MLS revokes a licensee's waiver, the MP cannot apply for a new waiver for the licensee until one year from the date of revocation.

Examples of violations of this policy include: any active real estate licensee found to be a party to an agency agreement or named as the listing agent or selling agent on a purchase agreement with respect to properties listed only in the MLS.

Member Services staff will administratively approve waiver requests for one or more of the reasons listed below; the Board of Directors must consider any waiver requested for a reason not listed.

1. Associates holding a license and dealing exclusively in property management or commercial and industrial properties and who do not access the MLS system for any reason
2. Principals or officers of the company who hold a license but who are not engaged in general brokerage of real estate and who do not access the MLS system for any reason
3. Any licensee associated with an MP who represents a new-home builder and handles on-site sales only, either working directly for the builder or indirectly for a MP representing the builder and who do not access the MLS system for any reason
4. Any affiliated licensees who only receive referrals and do not use MLS data in any manner to generate those referrals and are not engaged in listing or selling real property
5. Any licensee affiliated with an MP of Canopy MLS who exclusively subscribes to and markets listings in another MLS or Commercial Information Exchange. Canopy MLS will revoke the waiver for any real estate licensee entered into the Canopy MLS as a co-listing agent for a listed property, regardless of whether the listed property is required to be submitted to Canopy MLS
6. Any certified or licensed appraiser or appraisal trainee who already subscribes to Canopy MLS under a separate appraisal firm.

Any individual who has been on waiver from Canopy MLS for more than one year and wishes to subscribe or re-subscribe to the Canopy MLS will be charged the initial Subscription Fee and all current quarterly Subscriber MLS Service Fees, and will be required to attend the Canopy MLS orientation program. In addition, if at any time, an individual applies for a waiver after being charged a “reconnect” fee for non-payment of MLS fees, that individual will be required to pay the already assessed “reconnect” fee at the time the individual wishes to re-subscribe to Canopy MLS.

Dues

Annual Realtor® and Affiliate dues are billed each year on November 1 for the following calendar year. All Realtors® are invoiced for local, state and national dues. Affiliates are invoiced for local only or local and state dues, depending on membership type. Any payment not received by the due date will result in the termination of your Realtor® or Affiliate membership and loss of your Realtor® designation, if applicable. As required by the NAR, Realtors® who have not paid dues by the deadline will be dropped to a “non-member licensee” status and the DR for that licensee will be assessed additional fees (see below). To reinstate Realtor® or Affiliate membership, annual dues plus a reinstatement fee must be paid.

The DR of each licensee who loses Realtor® status for non-payment of Realtor® dues, will be billed a non-member licensee assessment fee for each non-member licensee. All non-member licensee fees must be paid by the DR. The Association will not accept money from a non-member licensee. Upon receipt of the non-member licensee assessment fee from the DR, the individual will remain a non-member and must discontinue the use of the term Realtor®. All Realtor® benefits will also be discontinued. Non-member licensees who wish to reinstate to Realtor® status within that year will be charged applicable fees. Should the DR choose not to pay the non-member licensee assessment, the licensee will be terminated and MLS access (if applicable) will be inactivated. This can only be done upon written proof that the DR has removed the licensee in question from his or her firm roster with the NCREC or South Carolina Labor and Licensing Board (the “SCLLR”).

The Association will send out reminder notices before the final due date to all who have not yet paid their dues.

Should the DR of the office fail to pay his/her own Realtor® dues by the payment deadline, the DR will be dropped from Realtor® membership and his/her MLS access and electronic key service (if applicable) will be immediately terminated. In order to reinstate to Realtor® membership and reactivate MLS and electronic key services (if applicable), the individual will be required to pay reinstatement fees and all outstanding balances on his/her account. If the individual fails to reinstate Realtor® membership, MLS and electronic key service (if applicable) for more than two-years, the individual must pay all applicable Realtor® application and MLS-related fees and will be required to attend Realtor® and/or MLS orientations.

*Dues for Realtors®, or spouses of Realtors®, in the National Guards or Ready Reserve who have been called to active duty, will be waived at the local, state and national level. Proof of active duty is required. This does not apply to career military.

Refunds

Annual Realtor® dues are non-refundable. Any request for a dues refund for the local portion of Realtor® dues will need to be submitted in writing to the Association Board of Directors. The Board of Directors will review the request and decide if an exception is in order. All dues amounts collected for the State and National Realtor® Associations are immediately remitted to the State and National Realtor® Associations and therefore, cannot be refunded by Canopy.

Any request for a refund or partial refund of Canopy MLS Service Fees, upon a member's resignation from Canopy MLS, will be on a prorated basis. If the resigning individual has had access to the MLS between the 1st and 15th of the month in which he or she is resigning, a partial month's refund will be granted. If the individual resigns and requests a refund after the 15th of the month in which he or she has had MLS access, no refund for that month will be granted.

Refunds for items purchased in the Realtor® Store will be issued if returned within 30 days of purchase and with the original receipt. Refunds will be issued in the original form of payment.

The Canopy Real Estate Institute refund policies are available online at www.CanopyREInstitute.com.

Membership to the Association for Current Canopy MLS MPs and Subscribers

The Association will waive the membership application fee for any current MP or Subscriber, in good standing with Canopy MLS, who applies to become a primary or secondary member of the Association. For those applicants who are current MPs or subscribers of Canopy MLS and who already hold the Realtor® designation through another Realtor® association, Association orientation will be waived. However, orientation is mandatory for any current MLS Subscriber who is a non-member licensee.

Realtor® Orientation and Failure to Attend within 30-days of Application

Attending the Association Realtor® orientation is mandatory for all new applicants. All active real estate and appraisal licensees must complete orientation within 30 days from the date of application. New applicants who apply to the Association and pay applicable joining fees but who then fail to attend the mandatory orientation program within 30 days will automatically lose provisional Realtor® status and will be converted to a non-member licensee. As required by the NAR, their DR will then be invoiced a non-member licensee fee for that individual. Applicants should note that all fees previously paid are non-refundable. The licensee will then need to reapply for MLS service and pay all applicable fees or submit a Canopy MLS Waiver form. If the new applicant who failed to attend Realtor® orientation is also the MP to the Canopy MLS, that firm office's MLS access will be deactivated until such time as that individual attends the Realtor® orientation program.

Canopy MLS Orientation

Canopy MLS requires all MLS applicants and all licensees (including licensed or certified appraisers and appraisal trainees) or assistants affiliated with an MP, who have access to and use of MLS-generated information, to complete an orientation program.

The orientation is devoted to the “Canopy MLS Rules and Regulations” and computer training related to MLS information entry and retrieval and to the operation of the MLS.

The Canopy MLS orientation program consists of a 3.5-hour orientation course covering topics including MLS Technology and Tools/Benefits, MLS Policies, Lockboxes and Electronic Keys and the MLS system.

Failure to complete within 30-days: Failure to complete Canopy MLS orientation within 30 days after access to the MLS system has been provided, will result in the deactivation of the licensee’s MLS access. Access to the MLS system will only be restored upon completion of the Canopy MLS orientation class.

Billing Procedure and Delinquency

Canopy MLS invoices MPs and Subscribers monthly MLS service fees on a quarterly basis.

Canopy MLS currently posts invoices on the first day of the month prior to the start of the quarter: December 1, first quarter; March 1, second quarter; June 1, third quarter; and September 1, fourth quarter. Invoices are due **January 1** for first quarter; **April 1** for second quarter; **July 1** for third quarter; and **October 1** for fourth quarter.

If payment is not received by the **due date** shown above, Canopy MLS will suspend the recipient’s MLS services and electronic key services, if applicable, and a late/reconnect fee will be applied to the delinquent account. The MP or Subscriber must pay all fees **in full**, including the late/reconnect fee, prior to service reactivation.

NOTE: Beginning in November 2025 for the 2026 calendar year, the following billing schedule will apply:

Invoices will be posted to MP and Subscriber accounts based on this schedule: November 15, first quarter; February 15, second quarter; May 15, third quarter; and August 15, fourth quarter.

MPs and Subscribers will have approximately **45 days** to pay posted invoices. Invoices are due January 1 for first quarter; April 1 for second quarter; July 1 for third quarter; and October 1 for fourth quarter.

If Canopy MLS does not receive payment by the due date Canopy MLS will suspend the recipient’s MLS services and electronic key services, if applicable, and a late/reconnect fee will be applied to their account. The MP or Subscriber must pay all fees **in full**, including the late/reconnect fee for reactivation.

Canopy MLS charges a \$25 fee to process any MLS payment made by check. The accounting office must receive payment by the due date, not postmarked by the due date. Canopy MLS does not consider returned checks as payment. Therefore, if Canopy MLS receives a returned check subsequent to the due date, Canopy MLS will assess the late/reconnect fee to the recipient, as well as the handling fee.

IMPORTANT: The MP is ultimately responsible for ensuring that Canopy MLS receives payment in full for each affiliated Subscriber and unlicensed assistant, including

late/reconnect fees, by the last day of the first month in the quarter: January 31 for first quarter; April 30 for second quarter; July 31 for third quarter; and October 31 for fourth quarter. If Canopy MLS does not receive payment or a copy of the letter sent to the NCREC removing the Subscriber from their firm's roster, Canopy MLS will suspend the office's MLS service.

MPs are responsible for all licensees and unlicensed assistants affiliated with the firm; therefore, if an MP does not pay his or her own invoice by the deadline, all Subscribers under that MP will have their MLS services suspended. In such instances, if Canopy MLS suspends MLS services, only the MP will be responsible for paying the late/reconnect fee. Once paid, MLS services for the firm will be restored.

AutoPay Option

MPs and Subscribers have the option of utilizing AutoPay to pay their quarterly MLS and key fees. **This option is ONLY available for MLS/key fees and DOES NOT apply to Realtor® dues, violations/citations and optional Canopy Foundation billings.**

Charges by credit card, whether payment is made manually or through AutoPay, will appear as "E.Commerce" on credit card statements and should not be disputed.

AutoPay will occur approximately seven (7) days prior to the start of the quarter. This advanced timing is to allow MPs and Subscribers time to make a manual payment for any failed/declined cards without incurring late/reconnect fees.

MLS/Electronic Key Inactivation

Subscribers who fail to pay quarterly Subscriber MLS Service Fees by the due date will automatically lose MLS access and a late/reconnect fee will be invoiced to his or her account. In addition, those Subscribers will also lose electronic key services (if applicable). In order to restore MLS/electronic key services, the Subscriber must pay the past-due amount and the late/reconnect fee as well as any current quarterly Subscriber MLS Service Fees. After non-payment, if the Subscriber is placed on "Will Advise" status by his or her firm (see below) and then re-affiliates with that firm or a different firm within the 90-day grace period, that licensee will be required to pay the full amount of the outstanding account balance, which includes the late/reconnect fee, as well as any current quarterly Subscriber MLS Service Fees, if applicable. If the licensee fails to re-affiliate within 90 days, all reinstatement fees, as described in the "Will Advise" section below, apply.

Returned Check Policy

Association: Check payments for annual dues that are returned for insufficient funds will be considered non-payment of dues and will result in the termination of membership. Reinstatement fees, including a \$25 returned check fee, apply for all terminated individuals.

Canopy MLS: Checks from a Canopy MLS MP or Subscriber returned for insufficient funds will immediately result in the suspension of Canopy MLS and electronic key services (if applicable). If the MP's check is returned for insufficient funds, the entire firm will lose access to the MLS. Service will resume only after receipt of cash, credit card, money order or a cashier's check for the full amount *plus* a returned check fee as

allowed by N.C. law. A second returned check within one year will result in the same suspension and re-instatement procedures *plus* the requirement that the next 12 months' payments be made by *cash, credit card, money order or cashier's check* only.

Assistant Access to Canopy MLS

Unlicensed assistants, who plan to access the Canopy MLS system must complete the appropriate assistant paperwork, which must be signed by the MP of the office, and pay a non-refundable, one-time orientation fee of \$25, quarterly MLS service fees of \$30, and attend MLS orientation. Assistants will be provided a unique username and password. If an assistant assists agents in *different* firms, that assistant will be issued user identification numbers for each firm and will be required to pay service fees under each firm.

Any active licensee who is a MP or Subscriber to Canopy MLS and who also serves as an assistant to a Realtor(s)[®] in a different firm(s) must obtain access to the Canopy MLS under the additional firm(s) by use of a unique member ID and password assigned by Canopy MLS. The licensee will be required to complete a Subscriber Request Form for each firm under which the licensee assists. The licensee is required to pay applicable MLS Service Fees for each firm with which the licensee is associated. The licensee will not, however, be charged Subscription Fees, as defined in the "Fee Schedule" herein, for the additional firm(s) with which the licensee is associated. *Example, licensed agent practices real estate under Firm A but also works as an assistant in Firm B. Licensed agent pays Subscriber fees under Firm A and assistant fees under Firm B.*

Any assistant found to hold an active real estate or appraisal license or found to be a party to a listing agreement, a buyer agency agreement or named as the listing agent or selling agent on a purchase agreement will be immediately activated as a Subscriber, charged the Canopy MLS Subscription Fee and applicable quarterly Subscriber MLS Service Fees. The licensee will also be scheduled for Canopy MLS orientation class. Failure to attend this class will result in the deactivation of their MLS. The licensee has fifteen (15) business days to complete this process. In addition, the MP of the office will be fined \$1,000.

"Will Advise" Status

Realtors[®] and MLS Subscribers who unaffiliate from a Member firm are placed on "Will Advise" status. Will Advise allows licensees 90 days to inform the Member Services Department of their intention to either re-affiliate with a new Member firm or resign from the Association/MLS without penalty.

Termination After 90-Day Will Advise

Any licensee who fails to take action within the 90-day period is automatically terminated from membership. Upon re-affiliation, the licensee is required to pay all applicable start-up fees for the MLS as well as any applicable fees to reinstate to Realtor[®] status.

Transfers

Licensees who transfer from one real estate firm to another must complete a "Transfer Request Form." The new DR/MP must sign the form and submit it to the Association with the applicable transfer fee and MLS fees.

The licensee will not be transferred to his or her new firm in the Association and Canopy MLS database until the Member Services Department receives the completed paperwork and fees. Please note that if paperwork is faxed but checks are mailed, the paperwork will not be processed until the Member Services Department receives the check.

To obtain the "Transfer Request" form, visit www.CanopyRealtors.com, or contact the Member Services Department at membership@canopyrealtors.com or 704-940-3110. The forms can be submitted by email with a credit card number, dropped off at the Association office or mailed. Subscribers who transfer from one office to another office within the same firm, and wish to take their listings with them to the new office, must complete the "Intra-Office Listing Transfer" form (see important note below).

Individuals are given 90 days to complete their transfers before they are terminated from the Association.

Intra-Office Listing Transfer Form

Canopy MLS will transfer listings between different firms upon receipt of a completed Listing Transfer Form signed by the MP of the releasing firm. In addition, there must be a valid, signed listing agreement in place with the receiving firm for each listing that is being transferred. Canopy MLS does not transfer closed, withdrawn or expired listings.

N.C./S.C. Real Estate Commission Letter

Upon receipt of a copy of the letter sent to the real estate commission regarding any licensee that has left a firm, Canopy MLS will suspend the Subscriber's access to the MLS, as well as electronic key service, if applicable.

Leave of Absence

Members who are *not* the DR or MP of a firm office may apply for a leave of absence from the MLS for three reasons: medical leave, military duty and acts of nature. Leaves are granted for periods not to exceed six months.

While on leave of absence, the licensee will not be charged Subscriber MLS Service Fees and will not be able to access the MLS system. Annual dues for Realtor® membership will continue to be billed since the licensee remains an active member of the Association. When the licensee returns from a leave of absence, Subscriber MLS Service Fees for the current billing period will be collected from the licensee. If the licensee was charged a "reconnect" fee for MLS services prior to submitting a Leave of Absence form, the reconnect fee will also be collected at the time the licensee returns from their leave. Canopy MLS does not grant leaves retroactively.

Realtor® Members Wishing to Start Their Own Firms

Active, licensed brokers who have at least two years' experience and have declared themselves BIC with the NCREC or have three years' experience and have been licensed as a broker by the SCLLR, have the option of working independently. When a Realtor® who has met the above criteria wishes to become the DR for his or her own firm, four things must occur:

- 1) A NC licensee must show proof of completion of the NCREC BIC course.

- 2) A new Membership Application and Transfer Request form must be completed and a \$25 processing fee must be paid.
- 3) A Canopy MLS Member Participant Request for Canopy MLS form must be completed.
- 4) Payment of the Start-Up Fee for the new firm, plus any quarterly MP MLS Service Fees, must be collected at the time applications are submitted.

Likewise, if any Realtor® who is a licensed or certified appraiser wishes to start his/her own firm, the following must occur:

- 1) A new Membership Application and Transfer Request form must be completed. A \$25 processing fee must accompany the Membership Application and Transfer Request form.
- 2) A Canopy MLS Member Participant Request for Canopy MLS form must be completed.
- 3) Payment of the Start-Up Fee for the new firm, plus any quarterly MP MLS Service Fees, must be collected at the time applications are submitted.

Quarterly fees are higher for MPs than they are for Subscribers. New MPs are billed the difference between the Subscriber MLS Service Fee and the MP MLS Service Fee for the current billing period.

New Firm

Any Realtor® establishing a new firm will be required to reapply for DR membership and then transfer that membership under the new firm entity. Specifically, this means that the Member Services Department will require the completion and submission of, (1) a new Realtor® Membership Application, (2) a Transfer Form and, (3) a Member Participant MLS Application. New firm MLS Start-Up Fees and a prorated portion of quarterly MP MLS Service Fees will apply. The new firm will be submitted to the Association and Canopy MLS Boards of Directors for approval.

The “Canopy Realtor® Association Bylaws” specifically state that to hold Realtor® membership, individuals must be “engaged actively in the real estate profession, including buying, selling, exchanging, renting or leasing, managing, appraising for others for compensation, counseling, or building, developing or subdividing real estate.” Realtors® must continue to meet membership criteria in order to remain a Member of the Association.

****NOTE:** Existing firms who are issued a new firm license by the NCREC and/or the SCLLR and who plan to list properties under the new entity will be required to pay Canopy MLS Start-Up Fees for the new firm and will be issued a new firm MLS ID number.

Firm Name Changes

Any firm wishing to change its name with the Association/Canopy MLS must submit the request, in writing, to the Association/Canopy MLS Member Services Department. The request must be signed by the DR/MP of the main office and must be accompanied by copies of the documentation sent to NCREC and/or the SCLLR regarding the filing of the name change. For example, the Member Services Department will require a copy of the firm license from NCREC and/or the SCLLR showing the name has been properly registered in order to make the name change in the Association/Canopy MLS database.

It is the policy of the Association/Canopy MLS that all firm names match the firm name registered with NCREC and/or SCLLR.

If a DR/MP organized as a sole proprietor becomes licensed as a firm by the NCREC or SCLLR within 90 days from the date the sole proprietorship was established in the Canopy MLS, no additional fees will apply. After 90 days, Canopy MLS Start-Up Fees will apply for the new firm.

Subscriber Opening Firm within 90 days of Joining

A new Subscriber to the MLS who attends orientation but ultimately decides to open their own firm individually as an MP within 90 days from the date of his or her Canopy MLS orientation class, will be charged the difference between MP MLS Start-Up Fees and the initial Subscription Fee previously paid. After 90 days, the full MP Start-Up Fee will apply.

Branch Offices

Each branch office of a real estate firm must have its own DR if it is located at a different address within North Carolina. MLS Start-Up Fees will be assessed for all branch offices. A branch office may choose to use the MP of the main office as the MP of each branch office. In such cases, Canopy MLS will assess the MLS Start-Up Fee for each branch office.

MLS Service in More than One Office

MPs and Subscribers may become affiliated with more than one office (including branch offices of the same firm) to list and sell real estate only when approved by the NCREC and/or SCLLR and the MP of each office. For each office affiliation, the MP or Subscriber will be charged additional MLS Service Fees for access to the MLS under each additional office and will be provided with a unique member identification number and password for each additional office.

When a Firm Loses its MP

When a vacancy occurs, created by the death, resignation or other permanent absence of a MP from a firm, in order to continue operating, the firm must designate a replacement MP, submit the appropriate paperwork, and pay all applicable fees within 48 hours. The replacement must hold an active broker's license, be designated as the BIC and must either be a Realtor® or be in the process of becoming a Realtor®. In order for the listings of the former MP to be transferred to the new MP, the new MP must make the request in writing for the listings to be transferred.

If the firm has not found a replacement within 48 hours, Canopy MLS will terminate MLS service until the firm finds a replacement and, if applicable, the replacement has applied to become a Realtor® and MP of the Canopy MLS.

Policy Regarding Company Mergers and Acquisitions

When a firm participating in the MLS merges with or acquires another firm that participates in the MLS, the MP/DR from each firm must submit, to the Member Services Department, formal written notice of the transaction. In addition, the Member Services Department must receive written notice of all transferring licensees within the two firms. (E-mail is acceptable.)

The MLS Start-Up Fee for the new consolidated firm will be collected if a new MLS firm ID is issued to the surviving entity.

In order for listings from the merging/acquired firm to be transferred to the surviving firm, the MP of the surviving firm must submit the request, in writing, to the MLS department. The MP of the merging/acquired firm must also sign the request. Failure to submit the listing-transfer request with the signatures of both MPs will result in all listings of the merging/acquired firm being withdrawn.

Nicknames

The Association and Canopy MLS permit the use of nicknames that are common derivatives of the first or middle name of the Realtor®, and readily identifiable to the public. The ethical use of nicknames requires that nicknames not be created solely for marketing purposes or to influence the public. The following list includes, but is not limited to, examples of what types of nickname variations are and are not permissible, as determined by and in the sole discretion of Canopy staff.

- Shorter versions of longer names that are commonly known are allowed. For example, variations of William (“Will” or “Bill”), variations of Robert (“Rob” or “Bob”), and variations of Elizabeth (“Liz,” “Beth,” or even “Betsy”) may be used. These nicknames may be used because the actual name can be easily determined.
- Similarly, a nickname involving the use of initials in place of your given name is acceptable, as when Thomas Joseph Jefferson goes by “T. Joseph Jefferson” or even “T.J. Jefferson.”
- A team name or company name as part of your nickname is not permitted.
- Additional words such as “Little Steven” or “Big Tom” are not permitted.
- We reserve the right to follow and impose the name rules adopted by the NCREC or SCREC without notice when infractions of this policy are identified in the MLS system.

Firm and Website Names

The Association/MLS reserves the right to object to any firm name or website name proposed by a current or potential member which, in the Association/MLS’s sole discretion, is confusingly similar to any name used in commerce by the Association/MLS that may leave the public confused. Any rejection of a proposed firm or website name will be registered with that firm at the time of application or at the time the name is first proposed. Members will be advised to change the name immediately. Please refer to the “Canopy MLS Rules and Regulations,” Section 12.5 and Chapter 3 for the complete policy.

E-Mail and Website Addresses

The Association/Canopy MLS reserves the right to reject any e-mail or website address submitted by anyone, which contains offensive or profane language or words, or other explicit phrases. Individuals in violation of this policy will be asked to resubmit a valid e-mail or website address that does not contain language considered to be offensive, profane or explicit.

Social Media Policy

Members of the Association and/or MPs or Subscribers of Canopy MLS who choose to participate in blogging, social networking or other public discourse that in any way refers to the Association/Canopy MLS or its products or services:

- Must explicitly and conspicuously state that the views they are articulating are their own and not the views of the Association/Canopy MLS;
- Must not state or imply they are speaking for the Association/Canopy MLS;
- Must not disclose any confidential or proprietary information about the Association/Canopy MLS, its customers or suppliers. This includes information that is not already in the public domain or that might give any of the Association's or Canopy MLS's competitors a competitive advantage. Proprietary information is not to be discussed or referred to on any social network site, even in private messages between site members who have authorized access to the information. If the individual is unsure about which information falls under this policy, he or she should check with Association/Canopy MLS management;
- Must not disclose any personal or confidential information about third parties, including other Realtors®, MPs or Subscribers, Association/Canopy MLS employees or others associated with the Association/Canopy MLS, or post pictures of them, without their permission;
- Must not use vulgar or sexually explicit language;
- Must not discriminate on the basis of race, gender, religion, age, disability or any other protected criteria;
- Must not use Association/Canopy MLS trademarks or copyrighted material without written permission;
- Must respect copyright laws, and reference or cite sources appropriately. Plagiarism applies online.

Use of the Association and Canopy MLS Logos

The Association and Canopy MLS logos are reserved for use by the Association and Canopy MLS only. Members of the Association, and MPs and Subscribers of Canopy MLS are strictly prohibited from using these logos. The use of the Realtor® trademark by members of the Association is encouraged and recommended. Please read NAR rules on use of the trademark by visiting www.nar.realtor.

Electronic Key Information

As defined in the "Canopy MLS Rules and Regulations," **KEYHOLDER** means: a Member Participant or Subscriber of Canopy MLS in good standing. All Keyholders must hold a valid real estate sales, broker's or property management license or be licensed by an appropriate state regulatory agency to engage in the appraisal of real property in North Carolina or South Carolina where the electronic key system will be used.

AFFILIATE KEYHOLDER: Means an affiliate member of the Association or an affiliate member of another Realtor® association where Canopy MLS is the primary MLS, as defined in subsections (1) and (2) below.

(1) General Contractors and Inspectors (Home, Radon, Pest and Structural Engineers) qualify, provided annual proof of licensure and insurance is presented and, if applicable, proof that individual is an affiliate member, in good standing, of another Realtor® association.

(2) Photographers/Virtual Tour Developers: Individual must be an employee of a real estate firm. In addition, the MP of the office must make a formal request in writing.

Unlicensed assistants are not permitted to lease an electronic key.

**Affiliate keyholders described in (1) above will have limited access the MLS system for the purposes of scheduling appointments through ShowingTime.

Returned Lockboxes

Lockboxes are sometimes returned to the Association by an individual who is not the owner of the lockbox. When this occurs, staff contacts the owner to let the owner know that the lockbox has been returned and is available for pick-up. The Association will hold these lockboxes for the owner for a maximum of three (3) months from the date of return. After that period of time, lockboxes that are not retrieved or sold back to the Association by the owner will be added back into inventory for resale.

Board of Director's "No-Show" Policy

Members who make reservations to attend an Association/Canopy MLS-sponsored event but fail to attend that event will be charged a "no-show" fee. The no-show fee will total the amount of the per-person ticket value/cost for the event. To avoid paying a "no-show" fee, cancellations must be received by the Association before the cancellation deadline (cancellation deadlines will vary). See "Fee Schedule" below for no-show fees.

Resignation

All members resigning from the Association or Canopy MLS must submit a completed resignation form to the Member Services Department. If the member is indebted to the Association for any dues, fees, fines or other assessments, the Association may condition the right of the resigning member to reapply for membership upon payment in full of such monies owed.

Should the resigning individual decide to re-affiliate with the Association after a period of time, payment of fees as outlined in the "Reinstatement to the Association/Canopy MLS" section will be required.

Rejoining the Association/Canopy MLS After Resignation

Canopy Realtor® Association

If a licensee rejoins the Realtor® Association at any time within the year following the last year in which annual Realtor® dues were paid, the licensee will be required to complete a new Realtor® Membership Application and pay the applicable year's Realtor® dues in full (no proration), plus a reinstatement fee. The licensee will not be required to attend Realtor® orientation. (See (a) below).

If a licensee wishes to rejoin the Realtor® Association at any time following a one-year lapse in dues payments, the licensee will apply as a new Realtor® member, will be issued a new join date and must pay the initial application fee and applicable Realtor® dues for that year. The licensee will also be required to attend Realtor® orientation. (See (b) below).

Examples:

- (a) Licensee resigns 11/15/2023 and has paid 2024 dues. Licensee rejoins 5/15/2025. Licensee will pay full 2025 dues plus a reinstatement fee. Licensee will NOT get a new join date and does NOT need to attend orientation.*
- (b) Licensee resigns 11/15/2023 and has paid only 2023 dues. Licensee rejoins 5/15/2025 - Licensee has not paid 2024 dues. To rejoin, the Licensee must pay the initiation fee + prorated local, state and national dues and attend Realtor® orientation.*

Canopy MLS

Subscribers who resign from the MLS and re-subscribe to the MLS at any time within the year immediately following resignation from Canopy MLS are required to complete a new Canopy MLS Subscriber Request form and pay a \$50 Reconnect Fee for MLS service, plus applicable quarterly Subscriber Service Fees. Canopy MLS orientation will be waived.

Subscribers who resign and re-subscribe to the MLS at any time following a one-year lapse in service, are required to pay the MLS Subscription Fee + applicable quarterly Subscriber Service Fees and must attend Canopy MLS orientation.

Examples:

- (a) Subscriber resigns 10/1/2023 and resubscribes 7/1/24. Subscriber pays the Canopy MLS Reconnect Fee + Full 3rd 2024 Quarter MLS Fees. No orientation.*
- (b) Subscriber resigns 10/1/2023 and resubscribes 2/1/2025. Subscriber pays the Canopy MLS Subscription Fee + prorated 2nd Quarter 2025 Subscriber Service Fees and must attend orientation.*

Note: Individuals who continue to be Realtor® members of an association who no longer desire MLS service should apply for a waiver from the MLS and must qualify for that waiver before it will be granted. (See MLS Waiver section above.)

Reinstatement of Firm to Canopy MLS

If an MP resigns from MLS, becomes a Subscriber and then applies for reinstatement as an MP, the charges that follow will apply. For a period not to exceed one year from date of resignation as an MP, the applicant must pay an administrative fee as described in the fee schedule below, plus pay the difference between MP and Subscriber quarterly MLS Service Fees. After one year, the applicant must pay the MLS Start-Up Fee to join the MLS as a new MP.

Reinstatement of Member Participant to Canopy MLS

If an MP resigns from MLS and then wishes to rejoin the MLS, the following charges will apply:

- a) If the MP rejoins MLS at any time within the year immediately following resignation from Canopy MLS, the MP must pay a \$250 firm reconnect fee and current quarterly MP MLS Service Fees.
- b) If the MP rejoins MLS at any time following a one-year lapse in Canopy MLS service, the MP must pay the Canopy MLS Start-Up Fee of \$600 and current quarterly MP MLS Service Fees. The MP will also be required to attend MLS orientation.

**In all situations, new applications must be filed with the Association and Canopy MLS Member Services Department.*

If the MP wishes to re-lease an electronic key, a new key agreement must be submitted and current leasing fees will be collected.

FEE SCHEDULE

Realtor® Dues

\$250 initiation fee (non-refundable)

For initial dues, add a prorated portion of the annual Realtor® dues, which are as follows:

Local – Association dues: \$195

State – NCR dues: \$210

Nat'l. – NAR dues: \$156

NAR Consumer Advertising Campaign: \$45 (not prorated)

Annual Realtor® dues for members: \$606

MLS Start-Up and Subscription Fees

\$600 Start-Up Fee for MPs (non-refundable)

\$250 Subscription Fee for Subscribers (non-refundable)

MLS Service Fees

\$85 per month for MPs

\$65 per month for Subscribers

MPs and Subscribers are invoiced monthly MLS Service Fees on a quarterly basis which are due by the 1st business day of the applicable quarter. Service Fees may include the prorated amount for the current quarter, plus next quarter's fees paid in advance.

Transfer Fee

\$25

MLS Late/Reconnect Fee

A Late/Reconnect Fee, as described below, will be assessed if Subscriber Fees are not paid by the due date.

***Late/Reconnect charges are in addition to any handling fees for returned checks.*

The following charges will apply to reconnect to the MLS, if payment is not received by the 1st day of the first month of the quarter.

A. Member Participants

1. Reconnect within the quarter:
 - \$100 outstanding reconnect fee
 - Current quarterly MP MLS Service fees
2. Reconnect within the following quarter
 - All outstanding fees (i.e., reconnect fees and past due quarterly fees)
 - Current quarterly MP MLS Service Fees
3. Reconnect in the third quarter after MLS deactivation for non-payment or any subsequent quarter thereafter within two years:
 - \$100 outstanding reconnect fee;
 - \$250 reactivation fee
 - Current quarterly MP MLS Service Fees
4. Reconnect following a one-year lapse in MLS service
 - \$600 Start-Up Fee
 - Current quarterly MP MLS Service Fees
 - MLS orientation

B. Subscribers: The Subscriber's MP will be notified if payment has not been received.**

1. Reconnect within the quarter:
 - \$50 outstanding reconnect fee
 - Current quarterly Subscriber MLS Service Fees
2. Reconnect in the following quarter:
 - All outstanding fees (i.e., reconnect fees and past due quarterly Subscriber MLS Service Fees)
 - Current quarterly Subscriber MLS Service Fees
3. Reconnect in the third quarter after MLS deactivation for non- payment or any subsequent quarter thereafter within two years
 - \$50 outstanding reconnect fee;

- Current quarterly Subscriber MLS Service Fees
4. Reconnect following a one-year lapse in MLS service
 - \$250 Subscription Fee
 - Current quarterly Subscriber MLS Service Fees
 - MLS orientation
- C. Unlicensed Assistants:
1. Reconnect within the quarter
 - Current quarterly Unlicensed Assistant MLS Service Fees
 2. Reconnect following a one-year lapse in MLS Service:
 - \$25 initiation fee
 - Current quarterly Unlicensed Assistant MLS Service Fees
 - MLS orientation

Electronic Key Services:

Key services will be inactivated for both MPs and Subscribers at the same time the MLS service is inactivated for non-payment of quarterly fees.

**The MP is ultimately responsible for ensuring that payment in full for the Subscriber, including the late/reconnect fee, is received by the last day of the first month in the quarter. If payment is not received, the firm's MLS service will be inactivated.

Reinstatement of firm to MLS

Out for less than one year working as a Subscriber

\$75 administrative fee, plus payment of the difference between MP and Subscriber quarterly MLS Service Fees

Out for more than one year working as a Subscriber

The MLS Start-Up Fee will be charged to join MLS as a new MP

Reinstatement of Member Participant to MLS

Applies to resigned MPs

Out for less than two years

MP shall pay a \$50 reinstatement, a \$250 firm reactivation fee, and current quarterly MP MLS Service Fees.

Out for more than two years

The \$600 MLS Start-Up Fee, plus current quarterly MP MLS Service Fees.

No-Show Fees

Canopy Housing Foundation events - \$15

Realtor® Hot Topics - \$15

Computer Training classes - \$15

Other Realtor® events – price varies depending on the event

SUPRA EKEY AND LOCKBOX FEE SCHEDULE

Fees

- 1) New Keyholders shall pay Key Issuance Fees for eKeys and System Services as set forth below. (Annual System Fee is prorated on a quarterly basis.)

- Annual System Fee \$156

- 2) The quarterly Supra System Fee is invoiced each quarter along with the applicable quarterly MLS Service Fee. Payments not received by the due date will be subject to penalties as set forth below *.

- Annual System Fee \$156
(Billed on a quarterly basis)

** Keyholders who fail to meet the payment deadline will be inactivated until payment is made.*

Keyholder Default

Keyholders found in violation or default of the Keyholder Lease Agreement and/or Canopy MLS Rules and Regulations are subject to the fines as set forth in the “Canopy MLS Rules and Regulations,” Section 8.