

Realtor Session Host Kit

Host **AI for Realtors** or **AEO for Realtors**, the two companion slide decks, for the agents you work with.

READ FIRST

Compliance checklist

- ✓ **Keep it educational.** Teach, don't pitch.
- ✓ **No quid pro quo or lavish giveaways** (RESPA Section 8). Keep hospitality modest.
- ✓ **Co-branded materials need approval** before they go out.
- ✓ **Check first.** Review branch compliance and marketing guidance before you plan.
- ✓ **No rate quotes.** Offer a one-on-one follow-up instead.
- ✓ **Include NMLS and Equal Housing Opportunity** on anything you hand out.

— Planning checklist

2 weeks out

- ☐ Pick one deck: AI for Realtors or AEO for Realtors
- ☐ Check branch compliance and marketing guidance
- ☐ Set the date, time, and place (office, brokerage, or Teams)
- ☐ Submit co-branded invites and handouts for approval

1 week out

- ☐ Send the invite (below) and track RSVPs
- ☐ Tailor examples to your market (play LO-09 helps)
- ☐ Print approved handouts with NMLS and EHO
- ☐ Rehearse once, out loud, with a timer

Day before

- ☐ Send a reminder with time, place, and parking or link
- ☐ Load the deck offline; save demo prompts in one note
- ☐ Capture screenshots of every demo step
- ☐ Check the screen, adapter, Wi-Fi, and power

Day of

- ☐ Arrive 30 minutes early
- ☐ Test the live demo on the room's Wi-Fi
- ☐ Have screenshots ready as a backup
- ☐ Set out the sign-in sheet and approved handouts

— Invite email template

Subject: You're invited: [AI for Realtors / AEO for Realtors], [day, date]

Hi [agent first name],

I'm hosting a free 45-minute session for agents on [AI for Realtors / AEO for Realtors] on [day, date] at [time], at [location or Teams link]. You'll leave with:

- [Takeaway 1, e.g. practical ways to save time on everyday agent work]
- [Takeaway 2, e.g. how buyers use AI to search, and how to show up in the answers]
- Prompts you can use the same day

It's purely educational: no sales pitch. Bring a laptop or phone if you'd like to follow along. Reply by [RSVP date] to save a seat.

[Your name] · [Title] · NMLS # [your NMLS]

Movement Mortgage, LLC · NMLS ID #39179 · Equal Housing Opportunity

— 45-minute run of show

0–5 min

Welcome and why this matters

- Thank everyone, introduce yourself, and share the agenda.
- Set the tone: “This is an education session, not a sales pitch.”

5–15 min

The big idea (deck, part 1)

- AI for Realtors: where AI saves agents time every week, and where it goes wrong.
- AEO for Realtors: how buyers now ask AI tools their questions, and what earns an agent a mention in the answer.

15–25 min

Live demo

- Run 2 or 3 prompts on real agent tasks, like a listing description draft, a client follow-up, or a plain-English market update. For AEO, ask an AI tool a local question buyers ask, like [best neighborhoods for first-time buyers in city].
- Screenshots ready if the Wi-Fi fails. Remind agents to review AI listing copy for Fair Housing language.

25–35 min

Hands-on practice

- Agents try one prompt on their own phone or laptop. Walk the room and help.

35–42 min

Q&A

- Keep answers educational. For rate or loan questions, offer a one-on-one follow-up; no quotes in the room.

42–45 min

Wrap and one next step

- Give everyone one next step to try this week, ask two quick feedback questions, and share the approved handout.

— Follow-up email template

Subject: Your next step from [AI for Realtors / AEO for Realtors]

Hi [agent first name],

Thanks for joining [session name] on [date]. My favorite moment was [something specific from the session].

YOUR ONE NEXT STEP

[Pick one prompt from today and use it on a real listing or client email this week.] Then reply and tell me how it went.

The approved handout from today is attached: [handout name]. Questions about anything we covered? Just reply to this email.

[Your name] · [Title] · NMLS # [your NMLS]

Movement Mortgage, LLC · NMLS ID #39179 · Equal Housing Opportunity

Send within 24 hours. Route the template through your branch marketing guidance before first use.