

Moving Families Initiative® Connectivity Platform™

powered by HSF Affiliates Home ConnectionsSM

Moving Families Initiative® Preferred Real Estate Agent™

Frequently Asked Questions (FAQ)

August 2020

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A. OVERVIEW

1. What is The Moving Families Initiative® (MFI)?

During these turbulent times, nothing is more important than the health and safety of you and your family, and of the customers and clients and their families, we serve at the Moving Families Initiative® and Moving Families Foundation™ (more on the Foundation later). The COVID-19 pandemic will bring about startling changes in the lives of many people. A number of these factors will contribute to a need for them to safely move or relocate, and “We Are Here To Help.”

The Moving Families Initiative® (MFI) is about awareness, education, and connectivity with a genuine purpose to simplify the moving process for the entire family when they move or relocate to a new home via a one-stop process at the Moving Families Initiative Connectivity Platform™. A specific focus is placed on assisting children ages 19 and younger in dealing with the physical and emotional challenges of changing neighborhoods, schools, and friends when they move, whether they are moving across town, across the country, or around the world.

2. How are The Moving Families Initiative® and World Class Coaches® connected?

World Class Coaches® (WCC) is the premier personal, professional, and executive coaching company in the world. The company’s mission is driven by five words: “Serve, Protect, Encourage, Inspire, and Empower.” World Class Coaches® serves as the facilitator of the Moving Families Initiative®.

3. Who are the Moving Families Initiative’s® customers?

U.S. Census data indicates that approximately 40 million people move or relocate, annually throughout the nation. Many of these moves are high school graduates moving from home to college, or college students moving to the next phase of their life after graduating from college. However, there are approximately 10 million children, ages 19 and younger, who move or relocate throughout the United States annually with their parents. That is approximately 4,000,000 families. In addition, according to the U.S. Military approximately 300,000 U.S. Military personnel members move or relocate throughout the United States annually. And another approximately 200,000 Military personnel members move or relocate worldwide every year. The Moving Families Initiative® serves this combined large demographic.

The Initiative’s services are customized to fit the specific needs of the children and their parent(s), based on the following age groups of the children: Newborn – Four, Five – 14, and 15 – 19 years old.

Many of our Initiative parents have several things in common. Among the top commonalities are: 1) Their chosen field or profession requires them to potentially move frequently and repeatedly. 2) They may have children ages 19 and younger in their household when they move or relocate their family. 3) Often, one parent must move in advance of the rest of the family.

Our commitment to serve and meet the needs of Initiative parent’s entire family, extends to the children’s older siblings, their grandparents, aunts, uncles, cousins, and other extended family members. Each are considered Moving Families Initiative’s® consumers, hereafter “clients”.

All clients must register for services on the Moving Families Initiative® Connectivity Platform (www.movingfamiliesinitiative.com) or by phone (1-866-224-8895). This includes any subsequent clients introduced to MFI Preferred Real Estate Agents™ by an existing MFI parent or client.

4. What are the goals of The Moving Families Initiative®?

The Initiative’s Goals are built around five keywords embedded in the World Class Coaches®’ mission: “Serve – Protect – Encourage – Inspire - Empower.” The Initiative seeks to serve the families’ needs in the following ways:

- Provide protection to the Initiative’s client’s entire family during periods of transition and change in their lives with a specific focus on protection for their children.
- Assist children in dealing with the physical and emotional challenges of moving, at no cost to their parents, or to the teachers or coaches who work with their children beyond the customary real estate brokerage and other moving relating fees.
- Encourage and assist children to be more active in extracurricular activities of their choice.
- No Initiative’s client moves or relocates their family throughout the country without developing and executing a free Moving Families Initiative®’s Written Game Plan™ to assist in achieving the Initiative’s goals, based on the customer’s needs, goals and timing.

- Our overall aim with the MFI is to provide families access to the following when they move or relocate, whether they are moving across town, across the country, or around the world.
 - High quality education
 - Extracurricular activities
 - Affordable housing
 - Economic opportunities
 - Protection for their entire family

B. AGENT ADMISSION REQUIREMENTS AND REFERRAL FLOW

5. What is a Moving Families Initiative® Preferred Real Estate Agent™ and how does one become eligible to serve these families?

There are approximately 1.2 million real estate agents throughout the United States. Approximately 10,000 across all real estate brands will be admitted to serve as a Moving Families Initiative® Preferred Real Estate Agent™ and Trusted Advisor.

In order to become eligible for consideration to serve as a Moving Families Initiative® Preferred Real Estate Agent™ and Trusted Advisor, agents must make an application through their broker or brokerage's primary Relocation or Referral contact, and must meet the following requirements:

- Be recommended and approved by your brokerage's Relocation/Referral department and agree to have your performance monitored by that department.
- Be a licensed real estate agent who is a REALTOR® in your respective state; and a member, in good standing, of your Local, State, and National Association of REALTORS®.
- Have served a minimum of 18 months as a licensed REALTOR®; and served families moving with children ages 19 and younger during that time as part of your normal scope of conducting your real estate business.
- Agree to take three-hours of Moving Families Initiative® training annually, provided by World Class Coaches®, or by an approved representative of the company.
- Agree to maintain the performance standards of all real estate contracts and agreements to become and maintain your Moving Families Initiative® Preferred status.
- Be dedicated to working with moving families, based upon their needs, goals, and timing, which may include temporary or long-term rentals, purchases or sales, with time frames ranging from immediate to 90 days, to 12 to 24 months or longer.
- Have a three-to-five-year goal and plan to increase your business through the delivery of enhanced quality service to all your customers and clients.

- Share similar World Class Coaches® (WCC) values, standards, and priorities; specifically, surrounding serving, protecting, and meeting the needs of our Initiative Parent's/client's families when they move or relocate, with a specific focus on protection for their children.
- Complete and return, through your Relocation/Referral department, a Moving Families Initiative® Preferred Real Estate Agent™ Trusted Advisor Agreement, and receive confirmation of your status as a Preferred Real Estate Agent™ and Trusted Advisor from World Class Coaches®. You may obtain a copy of the Agreement from your company's primary Relocation/Referral contact.
- Consistently direct any subsequent clients introduced to you by existing or former MFI parents/clients to register for services on the Moving Families Initiative® Connectivity Platform (movingfamiliesinitiative.com) or by phone (1-866-224-8895). You may direct these subsequent clients to request you by name when they register for services, and HSF Affiliates Home ConnectionsSM will communicate any such requests when they place the referral with your company's primary Relocation/Referral contact.

6. How do I register for and access the required three-hours of initial and annual training?

Contact your brokerage's Relocation/Referral contact. A training schedule and/or link will be provided by World Class Coaches®, or by an approved representative of the company.

7. How will I receive referral opportunities, once I am admitted to serve as a Moving Families Initiative® Preferred Real Estate Agent™?

Once admitted to serving as a Moving Families Initiative® Preferred Real Estate Agent™, you will be eligible to receive referral opportunities. Referrals will be placed by HSF Affiliates Home ConnectionsSM with your brokerage's primary Relocation/Referral contact, who will assign referrals only to a Moving Families Initiative® Preferred Real Estate Agent™.

All purchase and sale referral agreements sent to the brokerage's primary Relocation/Referral contact are for a period of 24 months. Any subsequent clients introduced to you by existing or former MFI parents/clients are to be directed to register for services on the Moving Families Initiative® Connectivity Platform (www.movingfamiliesinitiative.com) or by phone (1-866-224-8895). These subsequent clients may request you by name when they register for services, and HSF Affiliates Home ConnectionsSM will communicate any such requests when they place the referral with your company's primary Relocation/Referral contact

8. What are the general responsibilities of a Moving Families Initiative® Preferred Real Estate Agent™?

Preferred Real Estate Agents™ will serve as Trusted Advisors, assisting to achieve the Moving Families Initiative's® mission, ultimately meeting the needs and expectations of the clients in this specialized marketing channel. Agents will deliver the Initiative's services at no cost to the Initiative's parent/client, or the teachers and coaches who work with their children, (excluding the normal and customary fees charged by their brokerage for real estate services.)

The Initiative's services are selected to fit the specific needs, goals, and timing of the client, with special emphasis on families, especially those with children in the following age groups: Newborn – Four, Five – 14, and 15 – 19 years old.

Although you, as an MFI Trusted Advisor will deliver some specific real estate services and support, links and additional information about other related products and services available to the Initiative's customers, can be found on the Moving Families Initiative® Connectivity Platform, powered by HSF Affiliates Home ConnectionsSM (<http://www.movingfamiliesinitiative.com/services.html>).

9. What are some of the questions and topics that Preferred Real Estate Agents™ will be discussing with the Initiative families?

In the World Class Coaches® Servant Business Model™, business relationships are built on three things: Consumer Needs, Goals, and Timing. Timing is important on many fronts in the life of an Initiative's parent or client. When the timing is right for them (and only them), is when they will take steps to meet their needs or achieve their goals. Therefore, the questions and topics the Preferred Real Estate Agents® will be discussing with Initiative families will revolve around the 5W's and H-Factor: 1) "What" they need or desire to do, 2) "When" they desire to do it, 3) "Where" are they looking, 4) "Why," as in what's driving their needs or goals to move or relocate in their desired timeframe?, 5) "Who" is involved, and what are the needs of each person, for example, each family member? And, 6) "How" they wish to do what they desire or need to do?

Residential Transition Checklist

HSF Affiliates Home ConnectionsSM uses an online form to collect the following information or collects this same information via phone or email prior to sending the referral opportunity to your Relocation/Referral contact. All questions will be reviewed by the Relocation/Referral contact before selecting the right agent for referral placement. The website inquiry form consists of the following fields:

- First Name
- Last Name
- Email
- Telephone Number
- Current Street Address
- What is the best time to contact you during business hours?
- What college or university did you attend?
- Are you a veteran, active duty, reservist or related to someone who served?
- Spouse/Significant Other Name (not required)
- Are you working with a real estate agent? IF YES:
 - Name of Real Estate Agent
 - Name of Company/Brokerage of Agent
- Comments:

If information is incomplete or not enough is provided to qualify the customer's needs, HSF Home Connections may contact the customer to gather the missing information and may include some of the following qualifications.

It is important for the Referral Coordinator/Director and the agent, as a Moving Families Initiative Preferred Real Estate Agent, to ensure they fully meet the needs of Moving Families Initiative's customers, by asking many of the following questions:

1. Do you own the home you are moving from? Yes; No
 - a. If Yes: Will you be selling the property you are moving from? Yes; No
2. Will you be purchasing a property in your new location? Yes; No
 - a. If Yes: Within what time frame would you like to purchase a new home?
 0-6 months; 6-12 months; 12-24 months
 - b. If Yes: Do you need to sell the home you are moving from before you purchase your new home? Yes; No
 - c. If Yes: Will you need a home mortgage loan to assist you with the purchase of your new home?
 - d. If No: Do you need assistance finding temporary housing, a rental property or leasing? Yes; No
3. Whether purchasing or renting, will you need the services of a preferred, licensed agent to assist you with your insurance needs? Yes; No
4. Will any family member(s) move to your new destination/home before the rest of your family? Yes; No
5. Will any family member(s) remain in your current location/residence after your family moves to your new location? Yes; No
6. Do you have children ages 19 years old or younger who will be moving with you to your new location? Yes; No
 - a. If Yes: Please indicate how many children, you have in the following age groups
 Newborn – Four (4)
 Five (5) --14
 15 --19
7. Would you like assistance finding the right school(s) for your children in your new location? Yes; No
8. Prior to your move, did any of your children participate in any school supported extracurricular activities (Debate, music, clubs, sports, etc.)? Yes; No
9. Are any of your children planning to participate in any school supported extracurricular activities after you move into your new home? Yes; No
10. Prior to your move, did any of your children participate in any non-school supported extracurricular activities (Music, karate, soccer, golf, or others)? Yes; No
11. Are any of your children planning to participate in any school supported extracurricular activities after you move into your new home? Yes; No

The primary Relocation/Referral contact and/or the Moving Families Initiative® Preferred Real Estate Agent™ may use or adapt the below set of “Yes and No” questions (#12-22) to further probe for and meet the family’s needs.

Note: Some of these questions may uncover needs that can be fulfilled by providers or services available to families on the Moving Families Initiative® Connectivity Platform and will help you to prepare the Moving Families Initiative® Written Game Plan™. You will learn more about this topic during training.

12. Prior to this move, have you previously moved or relocated with one or more of your children ages 19 years old or younger who are still presently living with you at home?
13. Will any of your children need any type of special accommodations in their new school(s)?
14. Have you decided how your children will be traveling from home to school and back each day?
15. Will you have any licensed teen student drivers in your household once you move into your new residence?
16. Are any of your children planning on becoming a licensed teen student driver within 12-36 months of moving into your new home?
17. Will any of your children be graduating from high school within 12–36 months from the time you moved into your new residence?
18. Are any of your children planning on starting college within the next two – four years from the time you moved into your new home?
19. Are any of your children planning on graduating from college within the next two – four years from the time you move into your new residence?
20. Prior to your move, did you (mom/dad/parent) participate in any volunteer, school, or community extracurricular activities?
21. Are you (mom/dad/parent) planning on participating in any volunteer, school, or community extracurricular activities after you move into your new residence?
22. Comments:

10. What will the Preferred Real Estate Agent® do with this information?

Any information gathered from the Residential Transition Checklist during the initial interaction with the Initiative customer will be provided to the Moving Families Initiative® Preferred Real Estate Agent® who will use it along with the information they gather during their own consultation with the Initiative customer, to customize the Moving Families Initiative® Written Game Plan™.

- a) The Moving Families Initiative® Preferred Real Estate Agent™ coaches the Initiative's parent through the process of taking steps to achieve each element of the game plan.
- b) For example, if one of the children participates in soccer; one of the steps in the game plan will be to connect Initiative's Parent with the local soccer organization when the moving family arrives in their new home. The purpose is to get the child signed up to play soccer in their new community and begin the process of developing new friends on common ground.

C. RELOCATION/REFERRAL CONTACT ADDITIONAL REQUIREMENTS

11. Are there any additional requirements for the brokerage's primary Relocation/Referral contacts?

Yes, primary Relocation/Referral contacts must also sign and return the Moving Families Initiative® Preferred Real Estate Agent™ Trusted Advisor Agreement and must agree to the following:

- Commitment to assign Moving Families Initiative® referrals received from HSF Affiliates Home ConnectionsSM only to Moving Families Initiative® Preferred Real Estate Agents™.
- Agree to 24-month referral agreements on all purchase and sale referral opportunities from this channel.
- Support the Initiative families, based upon their needs, goals, and timing, which may include temporary, or long-term rentals, purchases or sales, with time frames ranging from immediate to 90 days, to 12 to 24 months or longer.
- Commitment to monitor and support agent performance in the delivery of services.
- Instruct MFI Preferred Real Estate Agents to consistently direct any subsequent customers introduced to them by existing or former MFI parents/customers to register for services on the Moving Families Initiative® Connectivity Platform (www.movingfamiliesinitiative.com) or by phone (1-866-224-8895). Agents may direct these subsequent customers to request them by name when they register for services, and HSF Affiliates Home ConnectionsSM will communicate any such requests when they place the referral with the brokerage's Relocation/Referral contact
- Will not proactively pursue recruiting Moving Families Initiative® Preferred Agents from other firms, based upon the MFI designation or affiliation.
- Collect and return all signed Trusted Advisor Agreements via email to mfi@worldclasscoaches.com or via fax to (702) 920-7655.
- Willingness and ability to interact with the Professional Software Solutions (ReloSpec) database for the acceptance and management of referral communications.

- Questions may be directed to: World Class Coaches® - mfi@worldclasscoaches.com

D. INITIATIVE CUSTOMERS

12. How does an Initiative customer start the process?

The Initiative customer will be directed to register for services, prior to working with a brokerage, and prior to the execution of a rental, sale or purchase agreement, via the Moving Families Initiative® Connectivity Platform (www.movingfamiliesinitiative.com) or by phone (1-866-224-8895).

Registration is accomplished by filling out an online form or by contacting Home ConnectionsSM via email or by phone. The customer will then be referred by HSF Affiliates Home ConnectionsSM, to the referral department within the appropriate brokerage, based on established and approved Effective Service Areas (ESA). After accepting the referral, the brokerage's Relocation/Referral contact will assign the customer to a Moving Families Initiative® Preferred Real Estate Agent™, who will assist the family in completing the rental or lease, or the purchase or sale of a property.

If a Moving Families Initiative® parent/customer introduces any subsequent customers to the MFI Preferred Real Estate Agent, that agent will direct that individual or family to register for services on the Moving Families Initiative® Connectivity Platform (www.movingfamiliesinitiative.com) or by phone (1-866-224-8895), before beginning to work with them. These customers may request the agent or company by name when they register for services, and HSF Affiliates Home ConnectionsSM will communicate any such requests when they place the referral with your company's Relocation/Referral contact.

13. What are the needs of the Initiative parents/customers in terms of homeownership and renting?

Initiative customers as Renters and Homebuyers/Homeowners

World Class Coaches® business relationships are based on three things: Consumer needs, goals, and timing. This is certainly the case with the Initiative's customers when it comes to renting, leasing, or purchasing or selling.

Many Initiative's customers own homes and prefer homeownership; however, the nature of their need to move or relocate may affect the timing in which they purchase or sell.

For example, college coaches, or college professors may change universities and when they do, they often will need to relocate immediately to begin work at their new school. Their spouse may remain behind at their old location with their children preparing the family to move at a later date. The coach or professor may need temporary housing in their new city until their spouse arrives before they will purchase a home in their new location. The timing in which they may consider purchasing or selling a home could range from 30-90 days to 12-24 months. Often, Initiative customers do purchase, but it is all driven by their needs, goals, and timing.

Based on their needs, goals, and timing, approximately 52% need some form of temporary housing, a rental. Many will potentially purchase or sell within 30-90 days, to 12-24 months.

Customers' Needs and Challenges

While we cannot fulfill all the needs of families dealing with the challenges of moving, it is important to keep their circumstances in perspective. Here is what WCC has learned from Moving Families Initiative® consumer groups about the needs and challenges Initiative families experience during periods of transition and change in their lives when they move or relocate.

Among the personal priorities expressed by the Initiative's parents are:

- Support and reducing stress for their children
- Sustaining the marriage, relationship, and family
- Maintaining their career path
- Retaining old relationships
- Building new relationships
- Helping children retain and make new friendships

The MFI addresses many of these key priorities and reinforces the Initiative customer's ability to successfully move their family. Initiative customers have told us that during this period they have several specific needs. They may have a particular need for guidance related to many aspects of the moving process.

At the location they are departing they need assistance in:

- Pricing/Selling their home
- Terminating leases
- Disconnecting Utilities
- Negotiating Insurance Issues
- Defining Moving Company plans and schedules
- Defining School Departures
- Collecting Medical Records from Doctors
- Defining departures from jobs/careers

From the new location perspective, they require guidance on:

- Finding/Purchasing a new home
- Mortgage Negotiations
- Relocation Options
- Insurance Issues
- Temporary Living and Rental Assistance
- Connecting Utilities
- School Information

14. How do Initiative customers find their way to the Moving Families Initiative® Connectivity Platform™ to register for services?

Initiative customers find their way to www.movingfamiliesinitiative.com via World Class Coaches® Consumer and Personal Provider Networks.

World Class Coaches® Consumer and Personal Provider Networks are comprised of organizations and entities across the country that interact with parents, coaches, children, and teachers. The Networks encompass many youth sports, extracurricular activity, youth development organizations, and coaches' associations that proactively create awareness of the Moving Families Initiative® services among consumers. The National Federation of High School Associations (www.nfhs.org) is one of the examples.

Families who interact with these organizations are directed to register for services on the Moving Families Initiative® Connectivity Platform. Once registered, HSF Affiliates Home ConnectionsSM steps into the picture to coordinate connecting the parents/customers with an MFI Preferred Real Estate Agent™ Trusted Advisor via a Home ConnectionsSM referral.

Initiative families may also introduce colleagues, friends, and families to their MFI Preferred Real Estate Agent™, who in turn will direct those subsequent customers to register for services on the Moving Families Initiative® Connectivity Platform (www.movingfamiliesinitiative.com) or by phone (1-866-224-8895), before beginning to work with them.

It's the actual act of an Initiative customer moving or relocating with children ages 19 and younger and connecting with a Moving Families Initiative® Preferred Real Estate Agent™ via an HSF Affiliates Home ConnectionsSM referral, that activates the Initiative for their family.

E. MOVING FAMILIES FOUNDATION™

What is the connection between World Class Coaches®, MFI, and the Foundation?

World Class Coaches® is a for-profit company. The corporation supports the *Moving Families Foundation™*, a 501c3 nonprofit organization.

In conjunction with the *MFI*, the *Moving Families Foundation™* provides family members access to character and life skills development activities, high-quality education, and protection for the entire family during periods of transition and change in their lives. The *Foundation* provides families (among other things) extracurricular activities scholarships for children, college scholarships for high school students, and life insurance benefits for single-parent households and their children when they move or relocate via the *Moving Families Initiative Connectivity Platform™*. With these offerings, the *MFI* and *Moving Families Foundation™* provides products, services, and benefits to assure we maintain a LIFELONG RELATIONSHIP with parents, their children, the children's grandparents, aunts, uncles, and with their extended family members.

Partial List of *Moving Families Foundation*® Community Outreach Goals

- *Moving Families Extracurricular Activities Scholarship Plan*: By December 31, 2022, our aim is for all eligible children, ages 19 and younger, who move throughout the U.S. with their parents participate in an extracurricular activity of their choice when they move to a new home. Our goal is to have the *Foundation* cover the cost of their participation for the first year via the *Moving Families Extracurricular Activities Scholarship Plan*.
- *Moving Families College Scholarship Plan*: By December 31, 2024, our goal is for all eligible high school students, who move or relocate throughout the U.S. with their parents during their high school years to have an opportunity to go to college if they desire to do so. The *Foundation's* commitment is to provide qualified students with a \$4,000.00 college scholarship, \$1,000.00 for each of their freshman, sophomore, junior, and senior years at a college of their choice via the *Moving Families College Scholarship Plan*.
- *Moving Families Single Parent Protection Plan*: Although the *Foundation* supports **ALL PARENTS** moving with children ages 19 and younger, by December 31, 2026, our aim is to provide life insurance protection for all eligible single-parent households (mom or dad) when they move or relocate with children ages 19 and younger, with a specific focus on protection for their children. The *Foundation* will provide and pay for a \$100,000.00 two-year term life insurance policy for the single parent and a \$10,000.00 juvenile rider for each of their children when they move or relocate to a new home, whether they move across town or across the country. The eligible single-parent family will own and be the beneficiary of the insurance policies.

Partial List of *Moving Families Foundation*® Funding and Operational Goals

- *World Class Coaches*® serves as donor and fundraiser for the *Foundation*.
- A portion of the proceeds from *Johnnie Johnson's* book, *"You're Closer Than You Think Whether You Realize It Or Not,"* will be donated to the *Moving Families Foundation*™.
- Our goal is to have the *Foundation's* assets yield the necessary returns to achieve the community outreach goals without touching the *Foundation's* principal assets. Our aim is to have the *Foundation's* assets reach a minimum of \$100M by December 31, 2022, and a billion dollars by December 31, 2030.
- Beginning the fall semester of 2022, the *Foundation* aims to provide a to be determined college endowment at each of the colleges in the University of Texas School System – followed by endowments at each University School System in other states throughout the U.S.
- A to be determined military deployment feature to support military families.

Initially, all scholarships and insurance policies will be awarded to eligible recipients on a first come, first awarded basis, based on availability at the time of request (See Terms and Conditions).

Scholarships and insurance policies will be offered in this manner until we hit the *Foundation's* goals to offer them to all eligible candidates according to plan.

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