



### **CASE #4 All in The Family**

REALTOR® Dionne Deal is helping her daughter Jada find her first home. After months of searching, they find the perfect condo and begin to prepare the offer. The offer is presented to the listing agent, Laurie List, and after some negotiation the offer is accepted with financing, home inspection and condo document review conditions in place with no additional terms. Dionne works with her daughter to satisfy the conditions and the transaction becomes a firm sale. On possession date, Laurie meets with Dionne at the property to hand over the keys. Jada is present with a moving truck ready and mentions to Laurie how excited she is and how grateful she is to Laurie and “her mom” for making it a smooth process. This is the first time that Laurie has heard that the buyer is related to the agent and she decides to call Dionne’s broker to discuss her concerns. When Laurie speaks to Dionne’s broker she learns that he was not aware of the transaction because it was not submitted to the brokerage. He later learns that Dionne did not send in the paperwork because she was not collecting a commission and instead asked her daughter’s lawyer to give the funds to her daughter as a cash back. Frustrated with the situation, Laurie contacts her board to file a complaint.

#### **Discussion Guide:**

Please consider and discuss the following questions with another in the real estate industry.

- **What legislation/rule/guideline could Dionne have referred to for guidance?**
- **What should Dionne have done to make this a more ethical interaction?**
- **Who did Dionne’s actions impact and what was the perception of these actions to each of those involved?**

Once you have reviewed and discussed the case study questions, please click [here](#) for other possible considerations