

MULTISTATE BROKER OF RECORD

Practice Overview · Designated/Qualifying/Principal Broker for TX · FL · GA · UT

WHAT WE ARE

Multistate Broker of Record holds the licensed broker-of-record designation for real estate companies that need a designated, qualifying, or principal broker on file with state commissions in Texas, Florida, Georgia, and Utah. Not a sponsoring broker for individual agents — the buyer is the company itself, and the engagement covers state-level broker supervision without the company having to hire a full-time broker.

STATE COVERAGE

STATE	LICENSE #	TITLE	GOVERNING STATUTE
Texas	595597-B	Designated Broker (TREC)	Tex. Occ. Code §1101.355
Florida	BK3555118	Real Estate Broker (FREC)	Fla. Stat. §475.161
Georgia	428909	Associate Broker (GREC)	O.C.G.A. §43-40-18
Utah	13828856-PB00	Principal Broker (Utah DRE)	Utah Code §61-2f-206

WHAT'S INCLUDED IN AN ENGAGEMENT

- Designated, qualifying, or principal broker on file with the state commission for the entity's licensed activity
- Written Policies & Procedures manual customized to the firm's state(s), business model, and licensed-agent count — required under every state's broker-supervision rule
- Quarterly compliance reviews documented and signed (cadence varies by tier)
- Advertising review and sponsored-licensee oversight, including CE and renewal tracking
- Trust-account and operating-account compliance review where applicable

ENGAGEMENT TIERS

TIER	MONTHLY FEE	FIT
Starter	\$500-\$800	Low-touch sponsorship; established operators with low transaction volume
Standard	\$1,000-\$2,500	Active oversight; regular transaction activity, multi-state coverage under one engagement
Intensive	Custom	High-volume, multi-entity, institutional, or elevated-risk engagements

No onboarding fee. No setup cost. No first-month surcharge.

WHO WE SERVE

PropTech startups · rental and listing platforms · vacation and short-term rental operators · iBuyers and flat-fee MLS services · property management companies (tech-enabled and traditional) · investment funds, syndicates, and holding LLCs · traditional brokerages and real estate teams without an in-house senior broker · commercial real estate firms (office, retail, industrial, multifamily, mixed-use).

TRACK RECORD + PRACTICE LEAD

Eight active company engagements as of 2026, longest continuous engagement since 2019 (national rental platform). Roster spans rental aggregators, vacation rental operators, multi-market residential developers, and investment platforms. Every engagement is verifiable via the relevant state commission's public license database.

David Montalvo — multi-state licensed real estate broker (Texas since 2015), 20-year U.S. Air Force veteran, SDVOSB, and PMP® credentialed since 2009. Over 17 years his licensed brokerage operations have closed ~500 transactions / ~\$140M in volume — combining direct-practice work and supervised production from sponsored agents. Personally responsible to each state commission for every sponsored firm.

Worth 15 minutes to scope your current setup?

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