



AGENT

TECHNOLOGY

MARKETING

GROWTH

SUPPORT

Ag

**What makes
us different
is what makes
the difference.**



Windermere
REAL ESTATE



Welcome to Windermere

Being a Windermere agent is much more than a job. It's a true calling. Our agents value the freedom, independence, and high earning potential of a career with Windermere. They find joy in helping others and exceeding their clients' expectations.

Windermere empowers agents through top-notch training, leading-edge marketing, and the best productivity tools. Our agents achieve a high level of personalized service, productivity, and success, while maintaining more balance in their lives.

At Windermere, we recognize the world is changing rapidly, so we drive ourselves to deliver meaningful innovation and dynamic marketing that help our agents stand apart from the competition. And it's no surprise that they're some of the most productive agents in the country when you pair their professionalism with our full suite of integrated tools and services.

We provide our agents the resources they need to master their craft, invest in their future, and make their communities a better place to live. If you would like to learn more about how Windermere can support you, let's connect!





Elevating and humanizing real estate, every day.

We are a company that is rooted in service. We support and inspire our network of entrepreneurs with the tools and resources they need to take their businesses to the next level. We are deeply committed to our communities and foster a culture of collaboration and teamwork.



VIDEO: *We Are Windermere*
vimeo.com/862088206

Relationship + Community + Collaboration + Creativity + Professionalism

RELATIONSHIPS, NOT TRANSACTIONS.

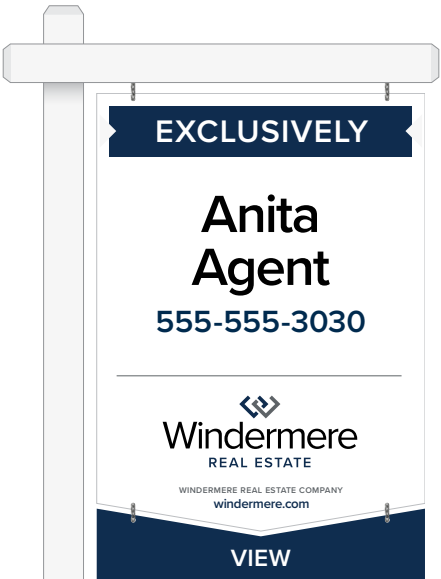
There's a secret formula that makes Windermere different, and it all starts with our people. This video gives you insight into our unique culture and approach, and what our difference means for you.

VIDEO: *The Human Algorithm*
vimeo.com/467427915



We are driven by a people-first mentality that fuels our relationships with our clients and with each other.

VIDEO: *Windermere Culture*
youtube.com/watch?v=-BdVcYmvaIY



For over 50 years, Windermere has put integrity and professionalism at the heart of our business. This, along with our commitment to building thriving communities, is what has helped Windermere grow into one of the largest and most respected real estate brands in the country, with more than 300 offices and 6,500 agents throughout the Western U.S. and Mexico.

STRENGTH IN NUMBERS



6,500+
ASSOCIATES

300+
OFFICES

9
STATES

\$58M+
TO CHARITY



Windermere is a proud member of Leading Real Estate Companies of the World®, a network of independent real estate firms with an uncommon commitment to service and integrity. Its network spans over 70 countries and 550 companies, giving our listings the highest level of global exposure, and connecting our clients to top real estate professionals worldwide. *NOT AVAILABLE IN ALL AREAS.*



Windermere's membership in the Luxury Portfolio network gives our clients access to targeted marketing, global exposure, and connection to top brokerages around the world. Luxury Portfolio markets more than 50,000 properties annually and sells more \$1M+ U.S. homes than any other network. *NOT AVAILABLE IN ALL AREAS.*



A Family Business

Windermere is, above all, a family company built on relationships. Founder John Jacobi paved the way for our second-generation leadership team of Geoff Wood, Jill Jacobi Wood, and OB Jacobi, who lead the company as CEO and Co-Presidents, respectively. Throughout our network, we have family members working together as partners and agents, as well as several second-generation owners. Passing down our love for what we do is what sets us apart.



COMMITMENT TO COMMUNITY



VIDEO: Windermere Foundation 2024
youtube.com/watch?v=GwYYGxRYC_s

MISSION: The Windermere Foundation is dedicated to supporting low-income and homeless families in our communities. What started in 1989 as a grassroots foundation serving families in need in Washington State, has grown to encompass ten states and has raised over \$58 million for organizations that provide shelter, food, children’s programs, emergency assistance, and other services to those who need our help most.

FIND OUT MORE

A portion of every Windermere agent’s commission is donated to the Windermere Foundation. Having 100% participation gives us a common purpose and sends a powerful message about our commitment to the communities we serve.



100%
PARTICIPATION

See the impact of this giving in our communities.

VIEW OUR COMMUNITY IMPACT REPORT

BUILDING BETTER COMMUNITIES



COMMUNITY SERVICE DAY

Every year since 1984, Windermere has closed its offices for one day to help make a positive difference in our local communities.

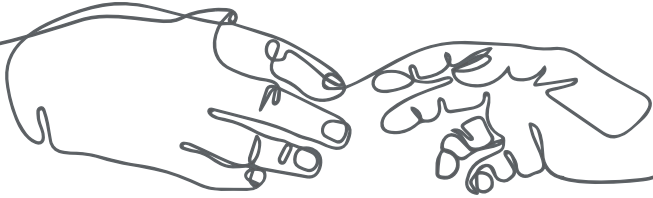
FIND OUT MORE

OUR COMMITMENT TO



At Windermere, we believe that everyone deserves a home, and we are committed to doing our part to drive change and make access to home ownership equitable.

FIND OUT MORE



WINDERMERE CUP

Held annually, Windermere Cup celebrates community and sport by inviting the top crews in the world to compete against the University of Washington rowing program.

WATCH VIDEO

FIND OUT MORE

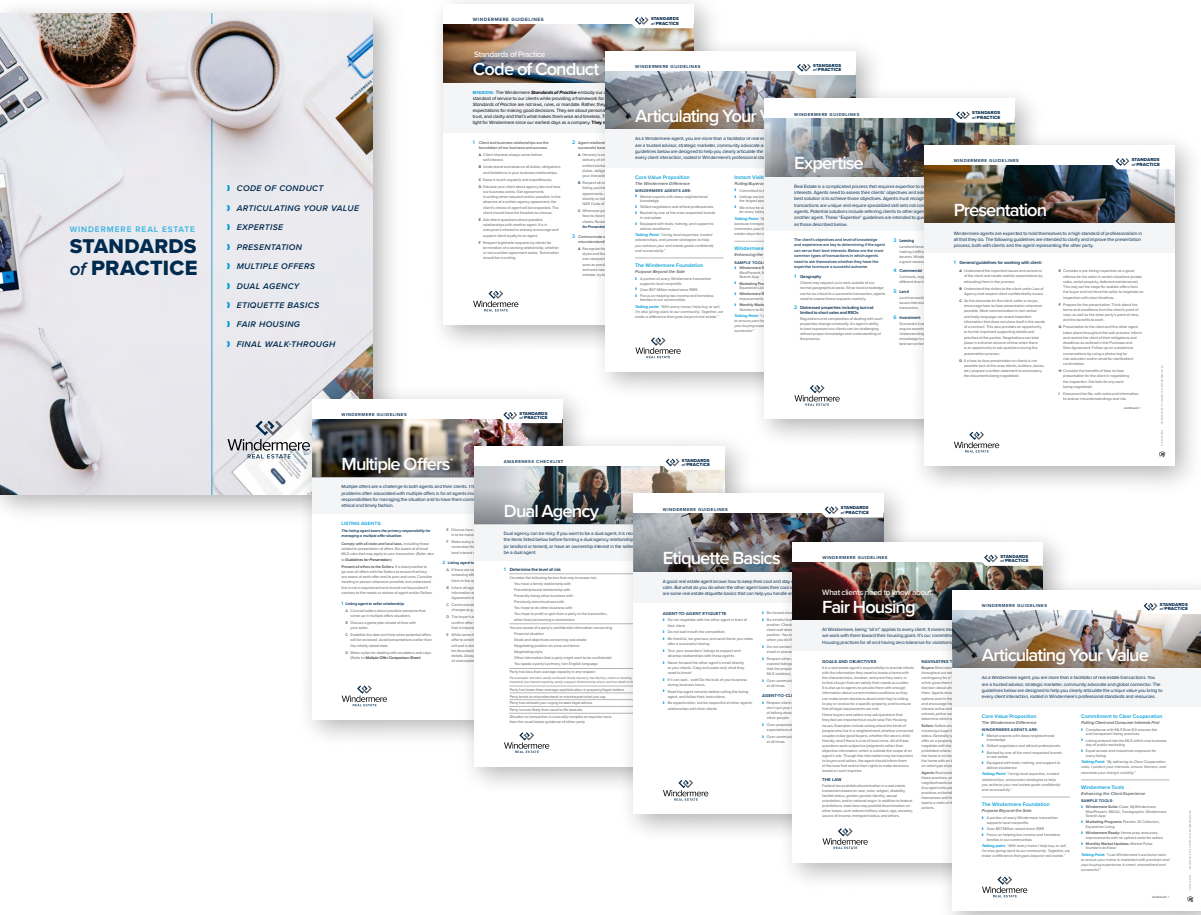
Setting the Standard

WINDERMERE STANDARDS OF PRACTICE

MISSION: The Windermere Standards of Practice embody our commitment to the highest standard of service to our clients while providing a framework for our professional agents. Standards of Practice are not laws, rules, or mandates. Rather, they are guidelines and expectations for making good decisions. They are about personal responsibility, respect, trust, and clarity; and that's what makes them wise and timeless. They have been a guiding light for Windermere since our earliest days as a company. They make us us.



WATCH VIDEO



THE WINDERMERE SUITE

Windermere has combined our marketing, technology and education tools into one comprehensive package, powered by industry-leading partners and backed by a full array of training and support resources. All of our tools are customized and integrated to help you increase your efficiency and grow your business. We call it the Windermere Suite, but you'll call it indispensable.

LEARN MORE IN THE FOLLOWING PAGES OR VISIT
WindermereSuite.com



Customized Tools to Support and Grow Your Business

Real estate technology never stops evolving, so Windermere's Technology team continually reviews new products and works with our providers to create the best tools tailored to the needs of our agents and clients. Then we back those tools with training and support to maximize their value and impact on your business.



MISSION:

Create tools to help you strengthen client relationships, streamlining communications and providing the information, tools and exposure to help you succeed.



WINDERMERE REAL ESTATE SEARCH APP

The Windermere Search App helps you manage the home search process from the palm of your hand. You can connect with clients on listings, see which homes they've viewed, and send property alerts that match buyers' criteria. [LEARN MORE](#)

ENHANCED Listing Details

Every listing details page on Windermere.com and Windermere's Agent and Office Websites contains neighborhood insights from Local Logic, an industry-leading location intelligence company, to help potential buyers make the most informed decisions to meet their needs.

WINDERMERE AGENT WEBSITES

Windermere's agent websites help you grow your brand, sphere, and business with professional templates that allow for your own unique personalization and branding. They include enhanced listing detail pages and lead generation and contact forms that connect you with potential buyers and sellers.

WINDERMERE Supportal

Windermere's proprietary tech support platform provides answers to frequently asked questions about our tech tools, gives real-time alerts when issues arise, and connects agents and staff with support professionals to answer questions promptly. [LEARN MORE](#)

LISTING MANAGER

Customize and differentiate your seller listings including expanded marketing remarks, unlimited photos, and embedded video for display on Windermere.com and your Agent website.



Partnering with the Industry's Best

Windermere partners with the industry's top tech providers to provide an integrated suite of tools for all your business needs.



CLOZE

Cloze is a smart CRM and AI assistant that can help you manage every aspect of your business in one platform. It offers an intelligent approach to email campaigns, including AI to write, edit and translate email copy into multiple languages, as well as message automation that feels authentic, and drip campaigns that adapt to clients' behavior. Integrated with the MLS, MAXA, and MoxiPresent, Cloze has a library of branded campaigns, templates, and content blocks that can be dropped into any email template, as well as tools for tracking engagement.

MAXA

WINDERMERE MAXA DESIGN CENTER

You can create beautifully branded marketing materials for listing and personal promotion with Windermere's MAXA Design Center. Turnkey templates and a built-in stock library (photos, videos, animations), AI writing and translation tools, social media publishing, and integrations with the MLS, Windermere Roster, and Xpressdocs, make it faster and easier than ever to produce high-quality, customized marketing.



MOXIPRESENT

More than a CMA, MoxiPresent is an interactive presentation tool preloaded with Windermere's library of branded presentation sheets. It lets you build customized CMAs and buyer tours in minutes, as well as create and send presentations from any device that include dynamic mapping features, interactive graphs and charts, and a sharable PDF leave-behind. Agents who use Present win and sell more listings, increase sales volume and impress clients.



HOMEDIARY

You can provide safe and effective virtual access to listings, without ever having to set foot inside a home, thanks to our partnership with HomeDiary. Choose from a full suite of options including photography, virtual tours, and 2D and 3D floor plans.



TESTIMONIAL TREE

Testimonial Tree makes it easy for you to manage your online reputation and share authentic stories from clients on your website and beyond. Testimonials can generate more leads through better client engagement and increased website traffic.



TRENDGRAPHIX

Delivering comprehensive insights to enhance market expertise, TrendGraphix unlocks MLS data you can analyze and use to develop pricing strategies and help clients make better-informed decisions.

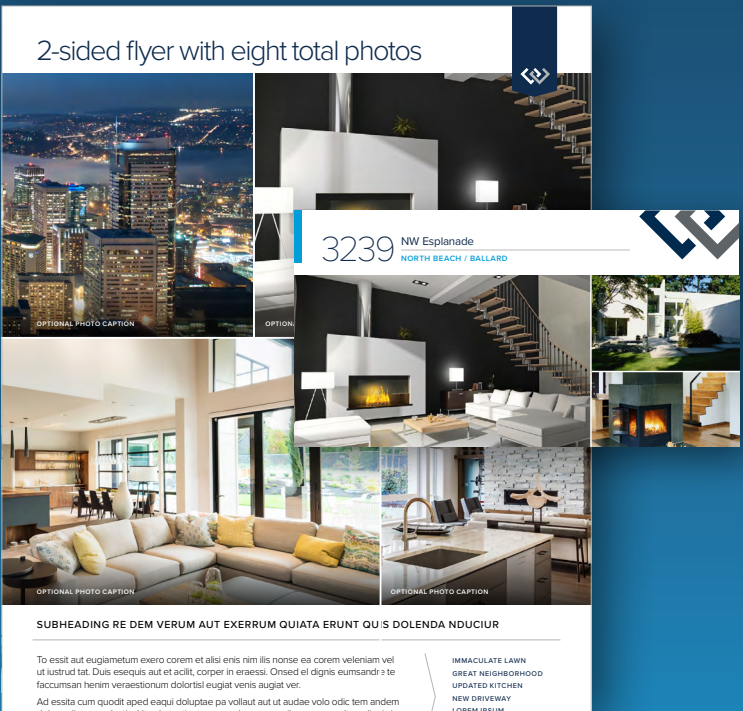
Windermere's Technology and Marketing teams work collaboratively to develop marketing solutions that are easy to use and integrated across multiple platforms, maximizing your time and efficiency. They also work with our Professional Development team to create training and support resources you can access anytime via Windermere University.



Strategic Marketing for Agents and Listings

**FAST. EASY.
AFFORDABLE.**

Windermere offers a best-in-class array of digital and print marketing tools and templates to suit any need and budget. Powered by industry-leading providers like MAXA, Cloze, Xpressdocs, and Adwerx, our dynamic tools will help you and your listings get noticed.



CLIENT PRESENTATIONS

LEAD GENERATION

AGENT PROMOTION

SOCIAL MEDIA IMAGES

AUTOMATED MARKETING

DIGITAL ADVERTISING

BRANDED APPAREL

DIRECT MAIL

DRIP CAMPAIGNS

EMAIL SIGNATURES

SPECIALTY MARKETING

PERSONAL WEBSITES

BUSINESS CARDS

OPEN HOUSE RESOURCES

LUXURY MARKETING

MONTHLY NEWSLETTERS

BRANDED GIFTS

LETTERHEAD & STATIONERY

TESTIMONIAL PROMOTION

MONTHLY MARKET STATS

MYWINDERMERE AVM

CLIENT RETENTION & FLOW

ANNUAL PROPERTY REVIEW

PERSONALIZED NOTECARDS

ECONOMIC REPORTS

EQUESTRIAN MARKETING

PHOTOGRAPHY &
FLOORPLANS

SOCIAL MEDIA PLAYBOOK

Our guide to all things social media, the Social Media Playbook has everything you need to stay connected with your sphere through your social channels.



AUTOMATED MARKETING



From property marketing to lead generation, client retention, and more, Windermere’s automated programs make marketing fast and easy.



HOME UPDATE MONTHLY NEWSLETTER

Home Update helps you stay connected to current and potential clients by providing them with guidance on home decor, maintenance projects, and fun activities to do around the house.



AUTOMATED LISTING ADS

Adwerx is key to scaling your advertising efforts. Their easy-to-use ad solutions help you reach new audiences and nurture existing relationships.



AUTOMATED GIFTING PROGRAM

An effective tool for automated client retention, Lolo offers simple, personalized email and gift solutions to help you nurture your book of business.



AUTOMATED EMAIL CAMPAIGNS

You can effortlessly nurture your contacts throughout the sales cycle with turnkey, branded email campaigns you manage from your Cloze CRM.



MARKET PULSE

Share valuable insights with your clients so they can better understand the market in their zip code and metro area. A mixture of data and graphs, the report shows active and pending listing insights and sales details, with context from the last 12 months.



AUTOMATED POSTCARD PROGRAM

For clients, it's the little things that make a difference. Boomerang keeps you top of mind through automated branding with a personal touch and valuable offers.



AUTOMATED MARKETING PACKAGES

Our MAXA marketing center automatically generates packages of turnkey marketing materials for personal and property marketing anytime a trigger event occurs. Whether you have a new, sold, or updated listing, or a new testimonial, MAXA makes marketing fast and easy.



AUTO-FLOW POSTCARDS

Stay connected monthly or on any months you choose with auto-flow postcards from Xpressdocs. Each features seasonal homeowner tips, themes, or recipes, as well as your photo, contact info and personalized greeting. Set your schedule and they will send automatically, with payments processed each month so it's easy to budget for this cost-effective campaign.



SUPPORTING YOUR SPECIALTY

An array of programs and resources tailored to different property types and agent specialties allow you to target your audience and leverage our turnkey marketing templates to grow your business.



Showcase your luxury listings with sophisticated marketing solutions designed to maximize visibility and attract discerning buyers. From elegant branding to strategic exposure, Premier Properties elevates your presence in the high-end market.



Deliver an unparalleled presentation for your ultra-luxury listings with bespoke marketing tools and exclusive exposure opportunities. W Collection is crafted to position your properties among the world's most prestigious homes.



If you specialize in the luxury market, becoming a Luxury Advisor gives you access to tools and resources to elevate your personal brand, enhance the impact of your marketing, and foster connections with other Advisors at exclusive educational and networking events.



If you have expertise in the equestrian market, being an Equestrian Advisor will give you access to tools and resources that highlight your skills and get you noticed, as well as opportunities to build meaningful relationships with other equestrian specialists.



Highlight the unique lifestyle and features of equestrian and equestrian-potential properties with specialized marketing resources. Equestrian Living connects your listings to the right audience, focusing on the space and amenities unique to equine properties.



Windermere Commercial agents represent business and investors alike in their commercial real estate pursuits, including retail and office spaces, industrial buildings, multi-family communities, and beyond.

SHOWCASE YOUR WINDERMERE PRIDE

Windermere offers a diverse array of branded merchandise, ideal for both personal use and client gifts. Show off your Windermere pride or express your appreciation with stylish, high-quality items that reinforce the professionalism of the Windermere brand.



WINDERMERE'S HOME SOUNDTRACKS

Windermere's Spotify channel allows you to connect with current and potential clients through curated playlists for every aspect of life at home and beyond. Here are just a few.



[CLICK TO LISTEN](#)



Our Training. Your Growth.

Windermere places a priority on professional development for our agents and strives to help meet your goals at every phase of your real estate career. Our instructors, coaches, and support team work tirelessly to provide around-the-clock educational content and classes, tailored to your unique needs and schedule.

AGENT JOURNEY

- › Onboarding
- › Pro-Start
- › 28 Day Challenge
- › Windermere Way

COACHING

- › Individual Coaching
- › Weekly Group Accountability Calls
- › Business Planning
- › Coaching Podcasts
- › Growth-focused Events

LATEST TRENDS

- › Stay Industry Relevant
- › Skill Building Classes for Windermere Suite
- › Gain a Competitive Edge
- › Enhance Digital Literacy

CE SHOP

- › State Approved Courses
- › Learn on Your Own Schedule
- › Direct Access through Windermere University (SSO)
- › Courses included Windermere Suite
(non certifications and elective and continuing education classes only)



Our Professional Development team helps our agents get up to speed and stay on top of their game through each phase of their real estate career. With a collection of learning tools and a strong support network, Windermere ProDev helps you reach your full potential and maintain better balance in your life.

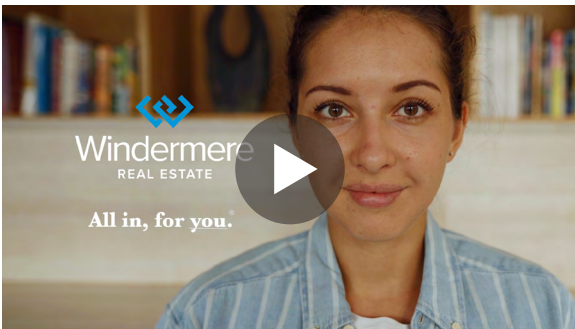


ONLINE EDUCATION

This online Learning Management System puts you in the driver's seat of your professional development. Get a constant stream of personalized, curated learning content you can view whenever and wherever it's convenient for you.

EMPOWERED GROWTH

At Windermere, we believe that education is the cornerstone of growth. Our learning tools are focused on more than just sales and clock hours. We teach you the skills to build relationships and systems that will nurture your business long-term, and we make them available at your convenience to save you valuable time.



VIDEO: *Growth is a Journey*
youtu.be/ETCbGYfbVOY





Helping our agents build a successful business based on long-term relationships is at the core of everything we do. Case in point: Windermere hosts weekly group coaching sessions to support our agents through regular accountability and dynamic best-practices for their business. These sessions are included in the Windermere Suite of tools, and agents can also add on personalized one-on-one coaching to address specific challenges.

COACHING FOR EVERY CAREER STAGE

DEVELOPING NEW AGENTS

- › Build a solid foundation with proven systems
- › Develop essential skills that universities don't teach
- › Create sustainable business practices from day one
- › Avoid costly rookie mistakes
- › Accelerate your learning curve dramatically

MID-CAREER PROFESSIONALS

- › Break through production plateaus
- › Refine your business model for greater efficiency
- › Develop advanced client acquisition strategies
- › Improve work-life balance while increasing income
- › Transform from agent to business owner

SEASONED VETERANS

- › Reinvigorate your passion for real estate
- › Implement cutting-edge technologies and approaches
- › Build a legacy and plan or succession
- › Maximize your market position and influence
- › Create passive income streams within your expertise

Push past your self-imposed limitations, unlock potential you didn't know you had, and achieve the breakthrough results that have been just beyond your reach. 

ABOUT OUR COACHING TEAM

Windermere's coaches aren't just teaching theories—they're successful real estate professionals who actively practice the same strategies they recommend. This practical approach means every session delivers actionable techniques agents can implement immediately to increase their listings, boost sales, and balance their personal life.

With a combined **34 years of experience** navigating every type of real estate market imaginable, our coaching team provides unparalleled business development expertise. They've weathered market highs, lows, and everything in between, so they can offer practical knowledge to help real estate agents thrive in any conditions.

BEYOND BUSINESS: OUR HOLISTIC APPROACH

At Windermere Coaching, we understand that exceptional real estate careers require more than just business tactics. Our coaching integrates:

Business Enhancement: Systems, strategies, and skills that drive measurable results

Personal Development: Mindset training that breaks through self-imposed limitations

Life Balance: Practical applications that enhance both professional success and personal fulfillment

PODCASTS FROM OUR COACHING TEAM



Transform your real estate career and reclaim your life with "Windermere Ask A Coach." Industry veterans reveal the systems, mindsets, and strategies that create exceptional results with less stress. Each episode delivers immediately applicable tactics from top-producing agents who've mastered the art of working smarter, not harder.

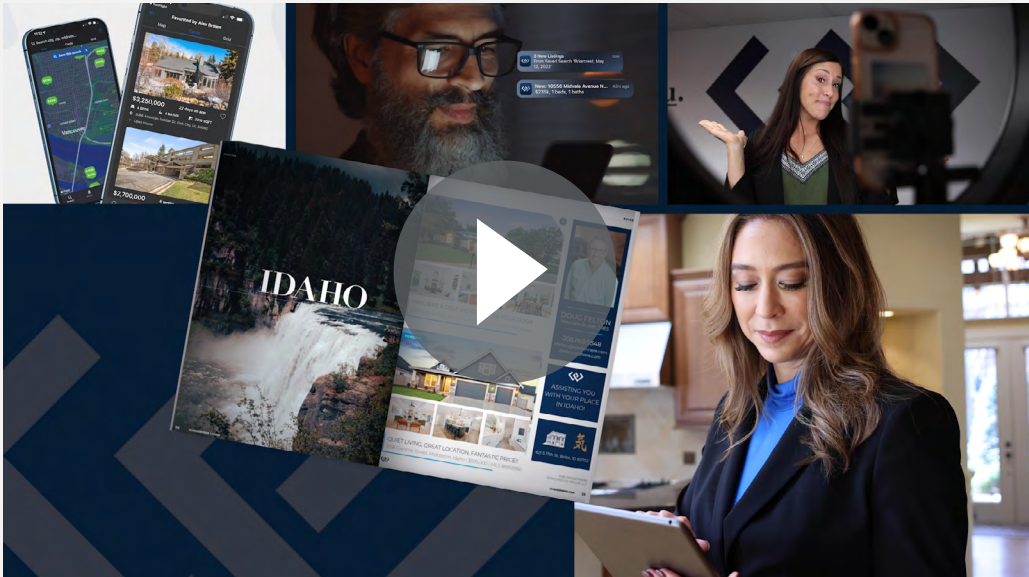


The Windermere Coaching Minute podcast empowers real estate professionals with actionable insights in just 25 minutes. From negotiation tactics to personal branding, each episode delivers practical wisdom that can be implemented immediately to elevate your life and business so you can thrive even during challenging market conditions.



Support for Success

Windermere Services Company exists to serve the Windermere network of agents and offices, providing the resources and support you need to successfully run your business.



VIDEO: *Support for Success*
youtube.com/watch?v=56UM1ukfyQY



WINDERMERE HUB

The HUB is Windermere’s internal communications platform, available online and via a mobile app, where you can stay informed about the latest tools, events, network and industry news, and educational opportunities. Viewers can also comment, ask questions, and tag one another directly from each post.



LAUNCH PAD

Our Launch Pad intranet site is intuitively organized for quick access to top tools, HUB posts, individual calendars, and all Windermere network tools, documents, and services.



BETTER BENEFITS

Through our partnerships with Nationwide and Stride, Windermere is able to make retirement planning and health insurance available to 1099 agents.



WINDERMERE RETIREMENT PLAN

Building wealth and planning for retirement is something everyone should be thinking about. Windermere offers a retirement plan across our entire network.



WINDERMERE AGENT HEALTH PLAN

We offer comprehensive and affordable health insurance for our agents and their families, with helpful advisors who create a personalized plan for you, fast and easy enrollment, and ongoing support to meet your changing needs.

NURTURING YOUR NETWORK

One thing that really sets Windermere apart from other companies is the collaborative culture we foster among our agents and offices. Our Events team is dedicated to providing high-quality events that facilitate learning and engaging with one another for personal and professional growth.



WINDERMERE Events & Experiences



OWNERS RETREAT

Held annually in different destinations throughout the country, Owners Retreat is a chance for Windermere franchise owners to come together to network, learn from each other, and engage with industry professionals.



MANAGERS EXCHANGE

Managers Exchange is an opportunity for managers to get together for a focused, collaborative multi-day session full of education specific to managers’ needs.



WINDERMERE SYMPOSIUM

This multi-day event is a network-wide rendezvous for learning and growth. Elevate your business and expand your professional sphere while traveling within the Windermere network.



CONNECTING CLIENTS

There are multiple ways in which Windermere connects clients and agents to increase sales. Wherever clients are in our network, these programs help them begin their buying or selling journey with a Windermere agent.

WINDERMERE.COM
CONTACT
AGENT FORMS

When buyers and sellers view pages and listings on Windermere.com, they will encounter multiple opportunities to find or connect with an agent for help.

WINDERMERE
RELOCATION

Windermere Relocation brings together a full-service relocation company with a full-service real estate company to provide superior service to our relocating clients.

WINDERMERE
REFERRALS

One out of every five clients has real estate needs outside of their agent’s market expertise. Windermere referrals helps connect these clients to trusted agents worldwide, providing the highest level of service and an expedited 20% fee to the referring agent.

WINDERMERE
CLIENT
CONNECTIONS

Our Client Connections program specializes in generating more business opportunities by identifying quality leads and moving them through the funnel.

BOLSTERING YOUR BUSINESS

Windermere offers a variety of revenue-generating opportunities designed to enhance your business and provide additional income.



Windermere is the exclusive brokerage partner for Seabrook, a beach town on the Washington coast dedicated to the concept of new urbanism design, which offers investment and second-home opportunities for clients.



Esterre has created an innovative model for second home ownership in Washington State that offers co-ownership opportunities for high-end properties in sought-after vacation destinations.

PROVIDING MORE VALUE TO CLIENTS

Windermere works with several trusted providers of real-estate related services that are committed to providing you and your clients with product excellence and top tier service, delivered with a high level of integrity that aligns with Windermere’s core values.



Moreland offers a range of customized insurance to give clients peace of mind that their most important assets are secure, as well as coverage for agents.



Committed to helping individuals and families achieve generational wealth through home ownership, Generations provides a forward-thinking approach to delivering customized, dependable mortgage solutions.

TITLE & ESCROW
ASSOCIATIONS

Windermere has strong relationships with multiple title and escrow companies throughout our footprint. These associations ensure that our agents and their clients receive exceptional support and service during every transaction.



The Windermere Ready program helps to cover your clients’ repair and upgrade costs to maximize the value of their homes and make them more competitive on the market.



Windermere’s exclusive bridge loan program eases the pressure clients often feel of having to sell before they buy by allowing them to use the equity from their current home to make a non-contingent offer on a new one.
AVAILABLE IN WASHINGTON AND OREGON



Windermere agents can provide clients with a selling advantage and peace of mind when buying a home through our Windermere Home Warranty program.
NOT AVAILABLE IN ALL AREAS

These companies and programs have a business relationship with Windermere Services Company (“WSC”) and reflect our high standards of service, but you are not required to use them. If you choose to do so, WSC or its affiliates may receive a financial or other benefit, which is limited to a return on ownership interest. WSC will not receive a referral fee.



All in, for you.®



Windermere
REAL ESTATE