



Haven's Path Partner Agreement

This Agreement is entered into on this ___ day of _____, 20___, by and between:

PARTNER ORGANIZATION: _____, located at _____, hereinafter referred to as the "Partner"

AND

ORGANIZED HAVEN: A DBA of Organized by Nicole LLC, a Florida Limited Liability Company, hereinafter referred to as "Organized Haven."

Purpose

Organized Haven, through its Haven's Path program, collaborates with professionals and organizations who serve older adults and their families. This agreement outlines the terms by which the Partner and Organized Haven may refer clients to one another in a spirit of ethical collaboration and mutual benefit.

1. Scope of Partnership

Organized Haven:

- Provides consulting, education, and move management services for older adults navigating housing, care, and lifestyle transitions.
- May refer clients to the Partner when appropriate, based on client needs and preferences.
- May receive referrals from the Partner for clients who may benefit from downsizing, moving, organizing, or housing guidance.

Partner:

- May refer prospective clients to Organized Haven in need of relocation planning or housing transitions.
 - May be referred clients from Organized Haven for services relevant to the Partner's expertise (e.g., real estate, senior living, legal, financial, healthcare).
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2. Referral Fee Structure



If and when a referral results in a closed transaction or move-in, the Partner agrees to compensate Organized Haven according to the following terms, where applicable:

- **Senior Living Community Referrals:** Partner agrees to pay 100% of the first full month's rent and care charges as a referral fee, or a discounted rate of 75% if Partner refers three or more clients per calendar year to Organized Haven.
- **Real Estate Referrals:** Organized Haven anticipates offering licensed real estate referral services through a licensed Florida real estate professional in the near future. Once licensure is active, and referral agreements are compliant with Florida law, REALTOR® partners may be asked to pay a 25% referral commission on the gross side commission earned. Until that time, referrals will be made without expectation of compensation, and any co-marketing or support services shall be coordinated without fee exchange.
- **Other Referrals:** Compensation, if applicable, shall be agreed upon by both parties in writing prior to the referral.

All payments are due within 30 days of transaction completion unless otherwise stated.

3. Client Conversion Definition

A “conversion” is defined as any Organized Haven-referred client who engages the Partner's services within 12 months of the initial introduction. The referral fee remains due even if the client delays their engagement.

4. Client Consent

Organized Haven confirms that referred clients have provided informed consent to share their contact information and referral details with the Partner. The Partner agrees to maintain confidentiality and only use client information as it relates to the referred service.

5. Non-Circumvention Clause

The Partner agrees not to bypass Organized Haven's relationship with the client by offering parallel services that duplicate Organized Haven's offerings, with the intent of avoiding a referral arrangement.



6. Ongoing Relationship

Organized Haven may continue to serve the client in other capacities before, during, or after the Partner's service delivery. The Partner agrees to respect this relationship and communicate as needed to ensure a coordinated client experience.

7. Legal Compliance

Both parties agree to adhere to all applicable laws and regulations, including licensing laws, real estate practices, fair housing standards, and data privacy requirements.

8. Term and Termination

This agreement remains in effect until terminated by either party with 30 days' written notice. All referral fees owed prior to termination shall remain payable.

9. Entire Agreement

This Agreement constitutes the entire understanding between the Partner and Organized Haven and supersedes all prior agreements. Any amendments shall be made in writing and signed by both parties.

Executed by:

Partner Organization Representative

Signature: _____

Printed Name: _____

Title: _____

Date: _____

Organized Haven Representative

Signature: _____

Printed Name: Nicole Ramer



Title: Owner, Organized Haven

Date: _____

Exhibit A: Sample Client Journey for Senior Living Communities

1. **Initial Consultation** – Organized Haven meets with the client to assess care needs, budget, and lifestyle preferences.
 2. **Tour Coordination** – Organized Haven schedules and attends up to 3 community tours with the client.
 3. **Decision Support** – Client selects preferred community based on personalized recommendations.
 4. **Move Preparation** – Client may choose to engage Organized Haven for downsizing, organizing, packing, and moving.
 5. **Follow-Up** – Organized Haven checks in post-move to ensure a successful transition.
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Exhibit B: Sample Referral Process for REALTORS®

1. **Client Discovery** – Organized Haven identifies client in need of a home sale or purchase and makes a referral to a REALTOR® partner.
 2. **Engagement** – Client signs listing or buyer agreement with REALTOR®.
 3. **Transaction** – REALTOR® closes the transaction and, once licensure is active, issues a 25% referral fee based on the earned side of commission.
 4. **Team Coordination** – REALTOR® and Organized Haven collaborate on downsizing, moving, and staging or prep services.
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This Agreement may be stored and distributed digitally and executed via electronic signature if preferred by either party.