

Seller Campaign Compliance Checklist

90-Day Seller Appointment Implementation Kit

Version 1.1 | Last Updated October 2, 2026

Purpose: Review housing advertising, contact permissions, data use, and brokerage requirements before launch.

Requires: Agent identity and jurisdiction; Read initial guardrails before drafting; review the completed offer, ads, funnel and contact messages before final approval; Actual privacy and contact practices

When to use: Before launch and whenever policies or practices change

Estimated time: 45–90 minutes plus required professional review

[Open the Resource Hub](#)

Verification and scope

LAST VERIFIED: October 2026. Confirm current federal, state, brokerage and platform requirements for your actual campaign before launch.

SOURCE: <https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business>

SOURCE: <https://www.ecfr.gov/current/title-47/chapter-I/subchapter-B/part-64/subpart-L/section-64.1200>

SOURCE: <https://www.ecfr.gov/current/title-24/subtitle-B/chapter-I/part-100/subpart-B/section-100.75>

SOURCE: <https://www.facebook.com/business/help/298000447747885>

Use this operational checklist with your brokerage or attorney/compliance professional. It is not a jurisdiction-specific legal determination. Record reviewer [NAME], state(s) [STATES], approved channels [CHANNELS], and review date [DATE].

Housing advertising and targeting

- ☐ Ads and destinations describe real seller services accurately and identify the licensed agent and brokerage as required locally.
- ☐ Use the applicable Meta Housing category and approved controls; do not evade it by changing the label of the resource.
- ☐ Targeting, qualification, content, and service handling do not exclude or prefer people because of protected characteristics or discriminatory proxies.
- ☐ Do not assume the platform's approval resolves Fair Housing obligations. Review ad content, targeting and delivery with your brokerage against current Fair Housing rules.
- ☐ Record the current permitted geography and audience controls in Meta Campaign Setup Checklist. Do not invent unavailable ZIP, radius, age, gender, lookalike, or exclusion options.

Email

- ☐ Use accurate sender and subject information, an appropriate commercial identification, valid postal address, and a working simple opt-out.
- ☐ Process marketing opt-outs immediately as the kit's operating rule; the FTC's federal guidance states a maximum of 10 business days and requires the mechanism to work for at least 30 days after sending.
- ☐ Keep requested delivery and appointment communications focused on their purpose; verify treatment when promotion is mixed in.
- ☐ Monitor any vendor sending on your behalf and preserve suppression across imports and workflow changes.

SMS Off until reviewed

Automated marketing texts can require prior express written consent under applicable federal rules; platform and carrier requirements and state protections can add obligations. Do not treat possession of a phone number, email permission, or an appointment booking as blanket marketing-text permission.

- ☐ Have a professional verify the exact messages, sending technology, current effective TCPA/FCC rules, DNC issues, and applicable state requirements.
- ☐ Use a separate unselected optional checkbox with the named sender/entity and scope; resource access is not conditional on marketing consent.
- ☐ Preserve the submitted wording/version, affirmative choice, timestamp, source page, and number securely. Record proof without unnecessarily collecting extra data.
- ☐ Complete the provider's required sender registration and messaging program checks; configure usable opt-out and suppression.
- ☐ Honor STOP and other applicable revocations; the kit defaults to immediate suppression rather than waiting for a legal maximum.
- ☐ Verify the contact's local timezone and use your counsel-approved quiet-hour window. Do not infer timezone from area code alone.
- ☐ Keep informational appointment permission and promotional permission distinguishable. Do not automatically text after a marketing opt-out without verified applicable permission.

Consent drafting framework for review, not publish-ready legal language:

Optional checkbox: I agree to receive [DESCRIBED MARKETING TEXTS] from [SPECIFIC AGENT / LEGAL ENTITY] at the number I provided, using [ACTUAL TECHNOLOGY WHERE REQUIRED]. Consent is not a condition of receiving the resource or purchasing services. Message frequency [ACCURATE DESCRIPTION]; message and data rates may apply. Reply STOP to opt out. [PRIVACY LINK] [TERMS LINK].

Replace and verify every field against the actual program. Leave SMS off if the sender, wording, consent record, or effective rules remain unclear.

Privacy and tracking

- ☐ Publish a real privacy notice describing who collects information, purposes, relevant vendors, disclosures, retention, contact route, and applicable choices/rights.
- ☐ Use an approved cookie/tracking consent process where required. Do not send personal/sensitive details through page URLs or campaign tags.
- ☐ Configure Pixel/Conversions API only with permitted data; server-side transmission is not a consent workaround.
- ☐ Limit access to homeowner records, use appropriate account security, and keep private records out of this public kit and example files.
- ☐ Set a documented retention/deletion process consistent with jurisdiction and brokerage obligations. Do not invent a universal period.

Market claims and professional boundaries

- ☐ Market facts have source, period, scope, sample, and permission. Do not publish fictional examples as actual data.
- ☐ A comparative pricing review is accurately identified and meets state brokerage rules; do not call it an appraisal if it is not one.
- ☐ Compensation inputs reflect the actual negotiated agreement. No standard commission percentage is asserted.
- ☐ Existing representation, referrals, disclosures, testimonials, recordings, and advertising approvals follow the brokerage's rules.

Update record

Topic [POLICY / UI / PRIVACY / SMS / LOCAL RULE]

Last verified [DATE] Official source [URL] Version/effective date [DATE / NOT STATED]

Reviewer [NAME] Change [DETAILS] Affected resources [IDS]

Reverify before launch, when a platform prompts a change, after a legal or brokerage change, and during the monthly review.

You are done when

The brokerage-required review is complete, contact permissions are recorded, and uncertain optional channels remain disabled.