O*NO LEGAL

THE REAL ESTATE AGENTS' LAWYER.

# TRAINING GUIDE.

# What We Do.

We help real estate and property management agency's by **empowering you** with the **knowledge** you need to operate a **thriving business**.

Whether you're part of a larger **business network** or a **small to medium-sized enterprise**, our training and education will **equip you and your team with the expertise you need** to confidently navigate your agency's legal landscape.

Now, you don't have to be a legal expert to legally cover your a*rse and **protect your agency.**

THE REAL ESTATE AGENTS' LAWYER.

# What Are People Saying.

O*NO Legal have provided our network with real estate training that gives us the knowledge and practical steps to ensure we are compliant with our responsibilities as licence holders, especially in relation to privacy, contracts, and agreements. The team all have extensive experience in real estate, and this gives us confidence in their ability to provide the brand with information we can trust.

Jo Hope

**HEAD OF OPERATIONS**
**BLACKSHAW CORPORATION**

Overall, I highly recommend O*NO Legal to anyone looking to deepen their understanding of the real estate industry within the legal space. Their Trainers/Solicitors are incredibly knowledgeable, engaging, and effective and have a proven track record of delivering exceptional results. Thanks to O*NO Legal, our network feels more confident and capable in this space, and we look forward to continuing our partnership with them.

Michael Anania

**HEAD OF PROPERTY MANAGEMENT**
**LAING+SIMMONS CORPORATION**

O*NO LEGAL THE REAL ESTATE AGENTS' LAWYER.


# How We Do It.

We understand that **one size doesn't fit all**, especially when it comes to real estate agencies. That's why we offer training sessions that are t**ailor-made for your agency.**

We customise our training to **fit your needs**, whether it be:

- In-person training
- Webinars
- Conferences

So whether it be **in person**, **remotely**, to a **boutique agency**, for a f**ranchise network**, or at an industry conference - **your success is our priority,** and we're here to **simplify the legal side** of things for you.

O*NO LEGAL THE REAL ESTATE AGENTS' LAWYER.

# The REAL Framework.

Our training sessions center around our REAL Framework, because it ensure that you:

- Protect your agency
- Build a valuable asset
- Accelerate expansion
- Future proof your relationships
- Plan for future growth
- Make a profitable exit

| SHIELD | RELATE | EXPAND | EXIT |
|---|---|---|---|
| Compliance first. | Sort your staff. | Plan the attack. | Determine exit strategy. |
| Shield your assets. | Strengthen your partners. | Join forces. | Succession plan to increase value. |
| Protect your reputation. | Engage your clients. | Seal the deal. | Execute the transition. |

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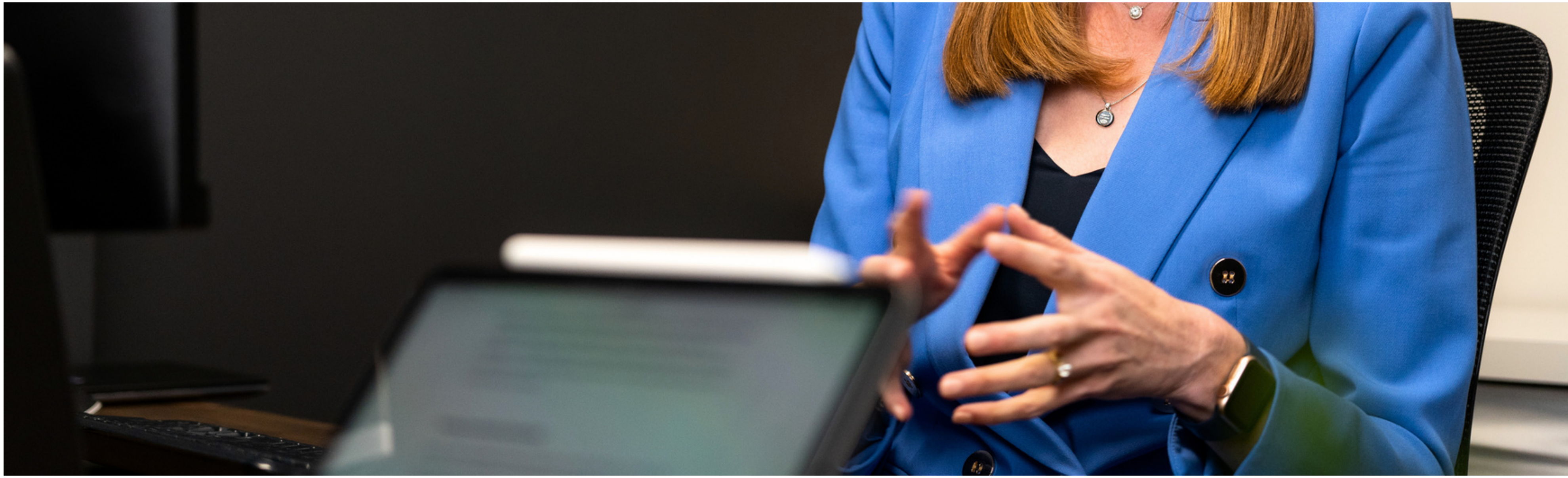
# Part I - Shield.

You’ve worked hard to build your empire, **it deserves to be protected.** Our asset shield related training sessions **will help you protect your business** from o**pportunistic employees, partners, clients, and other parties** who may try and sue you down the track. Whether it be through a **‘compliance first’** culture, **corporate structuring**, or **digital strategies**, gain the knowledge you need **to safeguard your assets and reputation.**



## 01 How to Protect Your Client Database From Walking Out The Door.

***For Principals.***

This session is all about safeguarding your agency's client database and intellectual property (IP) when staff members depart. Learn to future-proof relationships, shield your assets, establish ownership rules for databases and IP, and real-life case studies illustrating costly mistakes made by other agencies, including a failed rent roll sale.

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## 02 Business Life Cycle and Legals Needed at Each Stage.

***For Principals, GM's / Operation Managers, CEO & CFO.***

Agencies have different needs as the go through the business lifecycle. This session explores your agency's legal 'must haves' as you go through the business life cycle - a deep dive from idea, start-up, growth, maturity and exit, and how the simple REAL Framework will ensure you are protected at each stage (shield, relate, expand and exit).

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## 03 Brand Protection, Business Names and Trade Marks.

***For Principals, Marketing Dept. and anybody thinking of starting their own agency.***

In this session, discover the critical considerations beyond selecting a business name and branding. Understand the importance of trade mark registration, differentiating between first use and first registration laws. Learn why registering a business name doesn't guarantee ownership and gain insights into trade mark benefits, registration criteria, and rebranding case studies.

## 04 Privacy Prepared 1.0

***For Principals, Senior Managers and Property Managers.***

This essential session ensures real estate professionals are Privacy Prepared by addressing mandatory privacy requirements. Learn to assess and manage data breaches, avoid fines (up in the millions), and establish necessary privacy measures to protect your brand, reputation, and client data. Ideal for those in wanting comprehensive privacy guidance to ensure compliance.

## 05 Privacy Prepared 2.0

***For Front Line Staff in the real estate industry.***

In this crucial webinar, learn the legal and practical essentials for handling personal information and data in real estate. Understand how to protect your agency's reputation and client data, clarify permissible actions with collected information, and develop a plan for privacy compliance to avoid potential fines of up to $50 million.

## 06 Do You Know Who Owns The Clients & Data in Your Agency?

***For Entry Level and Front Line Staff.***

This session is vital for real estate professionals aiming to shield their agency's client database and intellectual property. Learn legal aspects, protect assets, establish ownership rules, and avoid critical mistakes through real-life case studies. Ideal for those wanting to assist their principal in protecting these valuable assets.

## 07 Protect Your Reputation & Client Data in a Privacy Data Breach.

***For Principals and Senior Management.***

Learn all about the importance of preparing for data breaches, and focusing on privacy and data protection. Addressing both hacking and human error, learn to identify notifiable data breaches, take actionable steps, and safeguard your reputation and client data. Gain essential insights for maintaining brand integrity amid evolving privacy concerns.

## 08 Protecting Your Agency & Assets with the REAL Asset Shield.

***For Principals, Senior Managers and anybody thinking of starting their own agency.***

In this session, discover how to protect your agency's greatest assets with the Asset Shield. Addressing potential legal challenges, learn essential operational and legal elements to protect your hard-built agency from opportunistic employees, clients, or third parties. Gain peace of mind with the REAL framework, whilst debunking three common misconceptions in agency legals.

## 09 Business & Corporate Legal Structures to Set You up for Long Term Success.

***For Principals, Senior Managers and anybody thinking of starting their own agency.***

Explore crucial legal structures for asset protection and tax minimisation in this session. Understand the various structure types and their relevance to agencies at different growth stages. Delve into shared services and resources models, along with insights on outsourced property management—when it's suitable and how to establish it.

# Part II - Relate.

Your relationships are the most important part of your agency. **Future proof your relationships** by **sorting** out **your staff**, **strengthening your partnerships** and **engaging with your clients.** Our training and eduction will provide you with the **tools you need to protect your agency relationships** across a range of areas including **employment and contractor** arrangements, **talent retention**, **scaling** your team, and financial considerations.

## 01 How to Bring a New Business Partner Into Your Agency.

***For Principals and Senior Managers thinking of buying into an agency.***

This session is for real estate agents exploring new business partnerships, covering principals considering equity for top employees, securing talent, or senior agents looking to invest. Learn how to assess employee motivation for equity, various equity structures, manage partnerships with shareholder agreements, and future-proof relationships with business partners.

## 02 Securing Talent: How Your Competitors Are Reeling in the Best Talent.

***For Principals, Senior Managers, HR, & those looking to start an agency.***

This training session guides you in attracting top talent to your agency by focusing on the attraction business, creating a Culture Playbook, and implementing advanced remuneration models like trails, profit share, and commissions. Learn strategic approaches to talent acquisition, fostering positive culture, & compensation without compromising business interests.

## 03 Retaining Talent: Golden Handcuffs as Part of HR Retention Strategy.

***For Principals, Senior Management, and Team Leaders.***

In the current talent market, this session is tailored for Principals seeking to retain top team members through strategic incentives beyond salary increases. Explore the "golden handcuffs" strategy by tying team members through ownership/partnership offers. Learn when and how to implement this retention strategy, including initiating crucial conversations for success.

## 04 Future Proofing Your Relationship with Your Business Partner.

***For Principals or Sales Agents looking to start an agency.***

In this masterclass, learn to foster a positive, conflict-free, and profitable business relationship with partners for agency growth and risk mitigation. Cover strategic partner selection, equity vs. profit share, control decisions, creating a relationship roadmap, crucial considerations for shareholders' agreements, and insights for building and maintaining successful partnerships.

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## 05 Sorting Your Staff: Employment & Contractor Laws for Real Estate.

***For Principals, Senior Managers, HR, Team Leaders, & those looking to start an agency.***

In this session, gain insights on managing staff and facilitating team growth while protecting your vital client database. Demystify complex employment laws, understand employee and contractor distinctions, explore various employment types, including Real Estate Awards, and learn strategies to protect your client database when staff depart. Set your agency up for success.

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## 06 Remuneration Structures For Your Team.

***For Principals and HR.***

This training session focuses on team remuneration, emphasising legal compliance in areas such as salary, commission, and superannuation. Gain essential insights to ensure fair, lawful, and creative compensation practices for your team.

## 07 The Million Dollar Question: Grow Then Hire or Hire to Grow?

***For Principals, HR or Sales Agents looking to scale.***

This masterclass delves into strategic team scaling for agency growth, providing insights on the timing of expansion through hiring. Learn the advantages and considerations of scaling your team, whether to pursue growth immediately or wait and hire later, offering essential guidance for effective agency development.

## 08 Building EBU's and How to Engage Contractors the Right Way (Contractor Laws).

***For Principals, Senior Managers, HR, Sales Agents looking to scale.***

Explore building effective business units (EBUs) in this session. Understand the benefits and optimal scenarios for EBU building. Learn about the advantages and suitable situations for engaging contractors. Discover potential EBU traps, including payroll tax implications, for comprehensive insights into creating a successful business unit structure.

## 09 Scaling Using VA's: Tips, Traps and Your Legal Requirements.

***For Principals, HR, or Sales Agents looking to scale.***

This session explores team scaling with virtual assistants, addressing onshore vs. offshore options, their potential roles, and crucial considerations for data protection and privacy. Gain insights into optimising virtual assistance for enhanced productivity while ensuring compliance. a

## 10 With Clients: Securing Your Revenue Stream.

***For Principals, Senior Managers, EAs & those looking to start an agency.***

This session delves into the significance of listing agreements and MAA's,and  Contracts 101. Learn how non-compliant agreements jeopardise commission entitlement, discover common mistakes in contract preparation, and explore case studies highlighting agents losing commissions due to technicalities, and ex-employees walking out with with their listing

## 11 Using Contractors in Real Estate: The Structure You Need to Use to Avoid Large Claims.

***For Principals and Senior Managers thinking of buying into an agency.***

This session guides real estate professionals, whether established or starting up, on structuring contractor relationships to avoid legal complications. Learn the distinctions between contractors and employees, the importance of proper setup, potential penalties, court considerations, ensuring true contractor status, and protecting your agency when engaging contractors.

# Part III - Expand.

Stay **ahead of your competition** and **expand faster** with our strategic training sessions. Whether it be **acquisition** plans, **franchising**, conjunctions, developments, channel partners, **marketing and social media**, or transactional **buying and selling** of business assets, **rent rolls**, or **sales agency's - we've got your covered.**

## 01 Digital Marketing Law For Real Estate.

***For Principals, Senior Managers, Marketing & Sales Staff, Front Line Staff.***

In this session, learn to safeguard your online reputation, manage client database ownership, adhere to copyright and marketing rules (eg. Spam Act, EDM rules), navigate privacy laws, and effectively market yourself in the digital realm. Ideal for real estate professionals looking to build their brand, reputation, and client database.

## 02 How to Increase Your Rent Roll Value to Get Top Dollar on Sale.

***For Principals, Senior Managers, and anybody thinking of starting their own agency.***

This session will guide you on how to maximise your rent roll value. Ideal for principals looking to sell or those considering a purchase, it covers topics such as valuation criteria, the significance of management conversion, using contracts for legal protection, and strategies to enhance the multiplier for achieving the best price.

## 03 Joint Ventures: Tips, Traps and Secrets to Success.

***For Principals.***

Explore the realm of joint ventures in real estate in this session. Differentiate between joint ventures and partnerships, understand how joint ventures accelerate growth, and gain insights into setting them up successfully. Discover the secrets top agents use for thriving joint ventures with developers, along with essential tips and potential pitfalls.

## 04 IP Licensing: How Licensing Your Brand is the Fastest Way to Expand.

***For Principals.***

Explore brand expansion through licensing in this session. Learn why licensing is the quickest route for brand growth, distinguish between brand licensing and franchising, and avoid the pitfalls of unintentional franchising. Gain valuable insights and tips for setting up successful licensing arrangements to expand your brand effectively.

## 05 Strengthening Your Referral Relationships.

***For Principals, Senior Managers, and Sales Agents.***

This session focuses on growth through robust referral relationships, covering topics such as paid vs. unpaid referrals, understanding referrals and inducements, adherence to referral disclosure rules in real estate, and formalising these relationships for sustained success. Gain essential insights for building and maintaining strong referral connections.

## 06 Growth with Social Media and Google Reviews.

***For Principals, Marketing Staff, Front Line Staff, & those looking to start an agency.***

This session explores harnessing online media to grow your agency, addressing common pitfalls like misleading conduct and defamation. Understand the rules governing Google Reviews and strategies for handling fake or unfavourable reviews. Gain insights into the regulations surrounding online competitions for effective and compliant digital agency growth.

## 07 Rent Rolls: To Buy or Not to Buy? That is the Question!

***For Principals.***

In this masterclass, gain guidance on strategic decisions related to buying or growing a rent roll for agency growth. Learn key considerations such as when it makes sense to buy vs. grow your rent roll, conducting due diligence (DD), determining the right timing, and identifying the best rent roll to buy when the time comes.

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## 08 Advanced Growth Strategies & How to Actually Implement Them.

***For Principals.***

This session is all about advanced strategies used by Australia's fastest-growing agencies for accelerated revenue and value growth. Learn about building referral networks, navigating team growth, successful joint ventures with developers, the impact of outsourced PM, the benefits of buying rent rolls, and the legal aspects crucial for strategy implementation.

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## 09 Expanding Faster Though the Acquisition of Rent Rolls.

***For Principals.***

In this session, discover the immense value of a rent roll for an agency, often a key asset that can be leveraged. Explore what influences the rent roll's value, tips to maximise its worth over time, and safeguards to protect your purchase, ensuring the seller doesn't reclaim the managements. Understand the purchase process and management conversions.

## 10 Don’t Overpay: How to Know if the Price on a Rent Roll is Fair.

***For Principals.***

This masterclass is designed to help guide you to avoid overpaying for a rent roll. Gain insights into factors determining its value, due diligence tips and traps, and crafting a conditional offer. Learn essential strategies to make informed decisions in the acquisition process and optimise the value of your investment.

## 11 Buying a Rent Roll: How to Protect Your Purchase Price.

***For Principals.***

This training provides guidance on purchasing a rent roll while safeguarding your interests. Explore key considerations, including risks to watch for, retention strategies, protecting your purchase from seller’s stealing back managements, and understanding vendor and employee restraints.

## 12 What to Expect When Buying Rent Rolls: The Purchase Process.

***For Principals.***

This masterclass provides insights into a standard rent roll purchase, covering the steps involved, the purchase timeline, the process of acquisition, and management conversions. Explore the key advisors who can assist you throughout the journey, offering valuable guidance for a smooth rent roll purchase experience.

## 13 The Bankable Asset: Leveraging the Rent Roll.

***For Principals.***

This session explores leveraging rent rolls as security to borrow funds for expanding agency operations. Gain insights into the strategic use of rent rolls as assets for securing funding and implementing effective expansion plans.

# Part IV – Exit.

You have worked hard to build your business. When it comes **time to sell or exit**, you want to ensure that you **receive top dollar** and **protect your assets** so that you can **set yourself up** for your **next venture** or your **retirement.** Our training sessions will help guide you in your **succession journey**, whether it be to **plan your exit**, select the **right exit type** for you, or achieve a **smooth transition** when the **time comes to sell.**

## 01 How to Increase Your Rent Roll Value to Get Top Dollar on Sale.

***For Principals and Directors.***

This session will guide you on how to maximise your rent roll value. Ideal for principals looking to sell or those considering a purchase, it covers topics such as valuation criteria, the significance of management conversion, using contracts for legal protection, and strategies to enhance the multiplier for achieving the best price.

## 02 How Do I Get My Equity Out: Insights Into Different Exit Mechanisms.

***For Principals.***

This session will guide you on how to select your exit strategies to optimise your equity. The masterclass covers exit pathways such as sales (assets vs. shares, strategic moves), part sales (share sell-down, phased options, selling part of a rent roll), managing silent partners, and ensuring business continuity without owner involvement.

## 03 Which Strategy is Right For Me? Select Your Exit Strategy.

***For Principals.***

This masterclass is designed to guide you in selecting an exit pathway that aligns with your unique circumstances, and will cover succession plan development and timelines, post-exit impacts, restraints, retirement options, wealth creation, and considerations for continuing or listing/selling the business.

## 04 What Happens to My Agency If I Can’t Work? Protect Against Immediate Risks.

***For Principals and Directors.***

This session is all about what happens in case of an incapacitation and how you can protect your agency, covering risks of being a sole licensee, legal protections for incapacitated directors, limitations of personal power of attorney, and strategies for addressing immediate risks in agency management.

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## 05 How to Get Top-Dollar When You Sell Your Agency: Choosing the Right Exit Strategy.

***For Principals and Directors.***

Ensure your agency's future success with a strategic exit plan in this masterclass. Learn to enhance equity value, proactively grow, and maximise asset value. Discover optimal selling tactics, exit mechanisms, employee retention strategies, and the importance of aligning your exit strategy with personal estate planning.

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## 06 The Succession Plan: Let’s Secure Your Future.

***For Principals.***

This session guides you through succession planning, exploring essential elements, offering valuable tips, highlighting potential traps, and providing a practical timeline. Gain insights to confidently navigate the next steps, ensuring a smooth transition in your business leadership, and be well-prepared for the future.

## 07 What Is My agency Worth? The Pre-Sale Valuation and Diagnostic.

***For Principals and Directors.***

This session guides you through key considerations when valuing your agency for sale. Topics include pre-sale due diligence, understanding valuation multiples, financial performance benchmarking, evaluating the client base, assessing HR factors, addressing risk issues, and identifying areas for value enhancement.

## 08 How Can I Sell For More? Get Your House in Order & Add Value.

***For Principals and Directors.***

In this comprehensive masterclass, the focus is on elevating your sale price to its maximum potential. Delve into strategies for preparing your business for sale, enhancing valuation multiples, understanding buyer and valuer preferences, and optimising your data room.

## 09 What People Get Wrong: Why Your Business and Personal Estate Planning Must Align.

***For Principals.***

In this masterclass, discover the significance of aligning your business exit strategy with personal estate planning. Explore aspects like wills, powers of attorney, and testamentary trusts, understanding the crucial role of timing, evaluating value based on supply and demand, and navigating tax considerations for a comprehensive approach to a successful exit.

## 10 What's Next? The Sale Process.

***For Principals and Directors.***

Navigate the critical sale process for a seamless exit with this informative session. Explore key aspects, including what to expect, the timeline involved, and the role of advisors who can provide invaluable assistance throughout the entire process.

## 11 Finding The Right Buyer: Why Selling to the Highest Bidder Isn't Always the Smartest Thing to Do.

***For Principals and Directors.***

In this session, explore the nuanced process of selling, emphasising that the highest bidder may not be the ideal buyer. Learn to identify the "right buyer," understand why choosing the highest bidder may not be optimal, and gain top tips for maximising sale price through collaborative strategies and an impressive due diligence package.

## 12 Want the Best Price? Why You Must Time the Market.

***For Principals and Directors.***

In this session, learn to optimise the value of your agency sale by strategically timing the market. Explore the significance of timing, value factors influenced by supply and demand dynamics, and key tax considerations to ensure you reap the maximum rewards for your hard work upon exit.

## 13 The Final Steps: Sell Down or Make Your Exit.

***For Principals and Directors.***

In this masterclass, master the final steps for a seamless exit by selling or selling down your agency. Learn about maximiing value in the sales process, the sell-down process, full sale dynamics (assets vs. shares), expectations, complexities in selling a rent roll, and post-settlement considerations.

## 14 Negotiate Like a Lawyer: Your Terms of Sale

***For Principals and Directors.***

In this masterclass, protect the value of your agency sale by mastering the negotiation process with sale terms. Delve into crucial considerations such as sales structure, sales price, financing requirements, warranties, indemnities, restraints, vendor support periods, control issues, and additional requirements to ensure a favorable and comprehensive transaction.

I have attended a lot of training over my 35 years as a licensed real estate agent and business owner, both in person and via webinars, and I must compliment you on the exceptional quality of information you deliver. You have an incredible ability to deliver information that is easy to understand and adaptable to agency practice. A "must" for all agents wanting to stay current and ahead of the game.

Gail Schaefer

**SENIOR RELATIONSHIP MANAGER**
**PENDIUM ADVISORY**

> What I appreciated most about O*NO Legal's training was its ability to cater to the needs and interests of our team. As a result, everyone in our network felt they could gain valuable knowledge and skills that they could immediately apply to their work. I was particularly impressed with the trainers' use of real-world examples and case studies to illustrate key concepts. This helped to make the content feel more tangible and relatable, allowing us to see how the concepts we were learning could be applied in practical situations.

Michael Anania

**HEAD OF PROPERTY MANAGEMENT**
**LAING+SIMMONS CORPORATION**

**Ready to launch your path to a successful and knowledgeable agency with unique and customised training?**

**BOOK YOUR FREE CALL HERE**

**to discover how our training solutions can empower your team and agency!**

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Book your FREE 10 min chat

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Ready to launch your path to a successful and knowledgeable agency with unique and customised training?

**Book your free discovery call to see how we can work with you.**

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