

Agency Administration Mastery

Trust accounts, contracts, compliance — the engine room, engineered.

VERTICAL	LEVEL	DURATION	MODULES
Administration	Foundation	18 hours · 9 modules · 35 lessons	9

Programme overview

For agency admin staff, sales coordinators and PAs who want to own the operations of a high-turnover real estate business. Statutory trust accounting, contract administration, compliance calendars, and the systems that let a Principal actually leave the office.

What you'll master

- 01 Reconcile a sales and rental trust account to statutory standard
- 02 Identify and correct the top-5 trust breaches before they become audit findings
- 03 Prepare an agency for a Fair Trading / CAV / OFT audit — end-to-end
- 04 Administer contracts from exchange to settlement without letting a deadline slip
- 05 Run a compliance calendar that surfaces licence renewals, CPD, trust audits and insurance in one view
- 06 Communicate with vendors, purchasers, tenants and landlords with the confidence of an office manager
- 07 Build a systems documentation library so the office runs without you when you're on leave

Skill focus

- Trust Accounting
- Audit Readiness
- Contracts Administration
- Compliance
- Systems & CRM
- Communication
- Reporting

9 modules · one standard

I. 01 · Trust account foundations

4 LESSONS

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|----|---|----------------------|
| 01 | What money belongs in trust? | masterclass · 12 min |
| 02 | Segregation, mixing and the offences that end careers | reading · 14 min |
| 03 | Setting up a compliant trust account | reading · 13 min |
| 04 | Knowledge check | quiz · 8 min |
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II. 02 · Reconciliation to statutory standard

4 LESSONS

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|----|--|----------------------|
| 01 | The monthly reconciliation, step-by-step | reading · 18 min |
| 02 | The six reconciliation errors auditors always find | masterclass · 14 min |
| 03 | Knowledge check | quiz · 8 min |
| 04 | Scenario: The reconciliation is \$2,400 short | scenario · 10 min |
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III. 03 · Audit readiness

3 LESSONS

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|----|--|----------------------|
| 01 | The audit pack an auditor wants to see | reading · 16 min |
| 02 | Audit day: what to say, what to show, what to fix on the fly | masterclass · 12 min |
| 03 | Knowledge check | quiz · 6 min |
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IV. 04 · Contracts administration

3 LESSONS

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|----|--|----------------------|
| 01 | Exchange to settlement — the 42-day playbook | reading · 17 min |
| 02 | Managing special conditions in the office | masterclass · 12 min |
| 03 | Knowledge check | quiz · 6 min |
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V. 05 · The compliance calendar

4 LESSONS

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|----|---|----------------------|
| 01 | The annual compliance cycle | reading · 14 min |
| 02 | Tracking CPD for every licensee in the office | masterclass · 11 min |
| 03 | Knowledge check | quiz · 6 min |
| 04 | Scenario: "Borrow it from trust until Friday" | scenario · 9 min |
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VI. 06 · Systems, CRM and documentation

3 LESSONS

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|----|-----------------------------------|----------------------|
| 01 | CRM hygiene as a compliance issue | reading · 13 min |
| 02 | Building the SOP library | masterclass · 12 min |
| 03 | Knowledge check | quiz · 6 min |
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VII. 07 · Communication and stakeholder management

4 LESSONS

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|----|--|----------------------|
| 01 | The client-facing email that earns respect | masterclass · 10 min |
| 02 | Handling the difficult stakeholder call | reading · 12 min |
| 03 | Knowledge check | quiz · 4 min |
| 04 | Scenario: The vendor demands the deposit early | scenario · 9 min |
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VIII. 08 · AML/CTF file-keeping and privacy obligations

5 LESSONS

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|----|--|----------------------|
| 01 | AML/CTF and customer identification in agency admin — the principles | masterclass · 13 min |
| 02 | Building a defensible identification file | reading · 14 min |
| 03 | Privacy obligations and the Notifiable Data Breaches scheme | masterclass · 12 min |
| 04 | A staff member's laptop with tenant files is stolen | scenario · 9 min |
| 05 | Knowledge check: AML/CTF and privacy | quiz · 6 min |
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IX. 09 · Contractor WHS compliance and the trust audit walkthrough

5 LESSONS

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|----|--|----------------------|
| 01 | WHS obligations when engaging contractors and tradespeople | masterclass · 12 min |
| 02 | Walking through an auditor's trust account checklist | reading · 14 min |
| 03 | The most common audit findings and how to prevent them | masterclass · 11 min |
| 04 | Preparing for an unannounced regulator audit | scenario · 9 min |
| 05 | Knowledge check: WHS and trust audit | quiz · 6 min |
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