

W Agent office network planning workbook

PROPOSED | NON-BINDING | NOT FOR SIGNATURE

Use these eight templates to define a proposed office network, check each agency and give local advisers a clear brief. W would supply the agreed brand and marketing support. Each local agency would provide its own regulated property services under verified permissions and supervision.

Confirmed network operator

W Agent Pty Ltd
ABN 56 701 552 730 | ACN 701 552 730
Entity identifiers verified on 4 October 2026 [C1]. These identifiers do not establish an estate agent licence or ownership of brand rights.

Planning lead

Working version and review date

Proposed countries and Australian states

Eight templates

- 01 Brand operator boundary
- 02 Agency and head responsibilities
- 03 Application and due diligence
- 04 Responsibility and approval matrix
- 05 Franchise and disclosure readiness
- 06 Marketing approval record
- 07 Commercial terms for adviser review
- 08 Location rollout record

How to complete the workbook

Complete a separate location record for each proposed office. Tick a check only after review and keep the evidence reference. An unchecked item is unresolved. Enter N/A only after an adviser confirms why it does not apply. Use the PDF fields or edit the Word version.

This pack grants no brand right, territory, franchise, licence or authority to open an office. It is not a statutory disclosure document. Each participant retains duties imposed by law, including responsibility for its own conduct and representations.

01 Brand operator boundary

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Describe W Agent Pty Ltd's proposed marketing support and the local agency's separate service role. Actual activity and control determine regulatory duties. A marketing brand arrangement can still be a franchise [A1 A2].

Proposed brand owner and evidence of permission

Marketing support W would provide

Local agency entity and services it would provide

Activities outside W marketing scope

Boundary checks

- ☐ Identify who signs client appointments and supplies each property service.
- ☐ Keep appraisals, negotiations, licensed advice and client money with authorized providers.
- ☐ Check whether W staff, lead handling or controls cross a regulated service boundary.
- ☐ Review the whole brand, marketing plan and payment arrangement for franchise classification.

Scope changes that require renewed local review

Proposed wording: W supplies the support listed above. The named local agency provides the specified property services under its own permissions. This allocation does not exclude either participant's legal responsibilities.

02 Agency and head responsibilities

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The operating agency and its statutory supervisor need the permissions required for the location and service. An office head's individual licence does not replace the entity's duties or permissions [B1 B2 B3].

Agency legal name and business identifier

Jurisdiction and proposed service categories

Head name and legally required supervisory role

Entity and individual licence details and register references

Agency readiness checks

- ☐ Verify entity, individual, supervisor and branch permissions with the regulator.
- ☐ Check scope, restrictions, current status and renewal or notification dates.
- ☐ Document client agreements, staffing, supervision and required training.
- ☐ Confirm insurance, complaints, records and any trust account controls.
- ☐ Assess AML/CTF coverage, enrolment, program, officer, customer checks and reporting [B5].

Evidence references and next review dates

Victoria: check the company licence, one licensed officer in effective control and office management. NSW: check corporation licensing and the relevant Class 1 licensee in charge. Other jurisdictions need separate review.

Upcoming Victorian changes: representative registration starts 25 November 2026; annual minimum five CPD activities starts 1 April 2027. Check the transition before that launch date [B4].

03 Application and due diligence

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Record verified facts for an agency applicant. Obtain only necessary information through an appropriate private process. A completed application does not grant membership, brand rights or office approval.

Applicant name and contact

Proposed operating entity and location

Ownership and persons responsible for the business

Evidence to review

- ☐ Entity identity and ownership records are current.
- ☐ Agency and supervisor permissions are verified in the appropriate registers.
- ☐ Restrictions, disciplinary history and relevant conflicts have been assessed.
- ☐ Insurance and required client money arrangements have been evidenced.
- ☐ Funding, premises, staffing and service capacity have been assessed.
- ☐ Applicant understands the proposed service boundary and required local review.
- ☐ References or experience claims have supporting evidence and consent.

Evidence index and outstanding information

Reviewer name and review date

Outcome and reasons for further review

Record N/A and the reason where appropriate. Do not attach identity documents, financial details or sensitive client material to a public website form.

04 Responsibility and approval matrix

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Assign a named person for each workflow. W means W Agent Pty Ltd in its proposed marketing role. Agency means the identified local operating entity and its required supervisor.

Activity	W role	Agency role	Named owner
Brand assets	Create and check	Check local use	
Property claims	Check publication	Verify facts and approve	
Client appointment	No proposed role	Contract and supervise	
Advice and negotiation	No proposed role	Perform if authorized	
Client or trust money	No proposed role	Maintain lawful controls	
Franchise duties	Own franchisor duties	Own franchisee duties	
Leads and personal data	Own systems and notices	Own handling and records	
AML and complaints	Assess own coverage	Perform applicable duties	
Office exit	Lawful brand process	Protect clients and records	

Unassigned work and overlapping responsibilities

Local adviser and date reviewed

Each participant retains statutory responsibility for its own conduct. Brand approval does not certify property facts, grant a licence or transfer W's advertising, franchise or data duties to an agency head.

05 Franchise and disclosure readiness

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Australia can treat a marketing licence as a franchise when the defined marketing plan, brand and payment features are present. Record a local legal assessment before recruiting or entering an arrangement [A1 A2].

Classification and reasons including any claimed exclusion

Local adviser and assessment date

Australian process to assess

- ☐ Check brand rights, actual control, marketing assistance and all required payments.
- ☐ Give the official information statement first and within seven days of interest [A3].
- ☐ Prepare compliant disclosure, final agreement, Code copy and related documents [A4 A5].
- ☐ Allow the applicable 14 day consideration period and record required statements [A4].
- ☐ Create the register profile at least 14 days before agreement and use current form [A6].
- ☐ Check cooling-off, transfer and leasing rules and refund handling [A7].
- ☐ Review good faith, return on investment, compensation and prohibited terms [A1 A8].
- ☐ Check funds, annual disclosure updates, material changes and record retention [A4 A5 A9].

Disclosure and register dates with evidence references

Unresolved items before any offer or agreement

This checklist is not statutory disclosure and does not support blanket waivers. Review any standard form small business terms under the applicable unfair contract terms law [A10].

06 Marketing approval record

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Use one record for each campaign or material change. W brand approval checks brand standards. The local agency verifies property facts and gives required licensed-service approval. Each publisher remains responsible for its own communication [A11].

Campaign or listing and proposed publication channels

Agency legal identity and required licence display

Claims and evidence references

Before publication

- ☐ Property facts, prices, locations and service scope have current evidence.
- ☐ Testimonials, awards and network or experience claims are substantiated.
- ☐ The main message and qualifications give an accurate overall impression.
- ☐ The service provider is clearly identified near claims and enquiry forms.
- ☐ Lead collection, sharing and marketing contact permissions are reviewed.
- ☐ Remove unsupported promises about earnings, leads or outcomes.

Agency factual and local compliance reviewer and date

W brand and publication reviewer and date

Correction owner and action if a claim changes

Proposed identity wording: W Agent [location] is operated by [verified agency legal name and required licence details]. Property services are supplied by that agency. W Agent Pty Ltd supplies the stated brand and marketing support.

07 Commercial terms for adviser review

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Record proposals for local advisers. These fields set no fee, term, exclusivity or right. No earnings or profitability forecast is supplied. Final documents must reflect the actual model and mandatory protections.

Proposed term and renewal approach

Fee proposals and payment basis with evidence

Any common purpose contributions and administration

Proposed territory and online or shared lead arrangements

Support duties suppliers rebates and required investment

Terms requiring legal review

- ☐ Allow a reasonable opportunity to earn a return on required investment during the term [A1].
- ☐ Address compensation for Australian withdrawal, network changes and distribution changes [A7].
- ☐ Check buyback, branded stock or equipment, transfer, exit and lawful termination [A7].
- ☐ Preserve good faith and review indemnities, guarantees and unfair terms [A8 A10].

Exit costs compensation method and disputed open terms

Adviser instructions and next decisions

Proposed preservation wording: No allocation, disclaimer, limitation or indemnity excludes a right, remedy or duty that applicable law does not permit to be excluded. Each participant retains responsibility imposed by law [A8 A12].

08 Location rollout record

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Complete one record for each proposed office. Keep a location proposed until its evidence and legal review are complete. Internal review does not constitute regulator approval.

Proposed location name country state and city

Agency entity head and statutory supervisor

Exact service categories and client contracting entity

Location checks

- ☐ Permissions, branch notifications and supervision are verified.
- ☐ Premises, insurance, staffing and trust arrangements are evidenced.
- ☐ AML, privacy, complaints and recordkeeping duties are assigned.
- ☐ Franchise classification and any required disclosure process are complete.
- ☐ Brand rights, website identity and marketing samples have been reviewed.
- ☐ Operating capacity and required investment have supporting evidence.

Status proposed due diligence adviser review or launch review

Open conditions owner and due date

Next review date and evidence reference

Reassess each country and Australian state separately. Start with a pilot, review the actual operating evidence and repeat the checks before further locations. No office is identified as open or authorized by this pack.

Country checks before office rollout

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A single global contract is not ready for use. Select the country, state or UK nation and exact services before local advisers confirm the classification, permissions and documents.

Australia

Check the current Franchising Code, state or territory agency rules and covered AML/CTF services. The full 1 November 2025 Code rules and 1 July 2026 AML reforms are relevant to a current launch [A1 A2 B5].

United States

The federal rule tests brand association, significant control or assistance and required payments. Covered offers need a 23 item disclosure document and 14 calendar days before agreement or payment. Check state franchise and real estate rules separately [C2 C3].

United Kingdom

Check estate agency activity, HMRC supervision and redress. HMRC says actual franchise control can make the franchisor responsible for AML supervision; an independent franchisee registers itself. Pure advertising exclusions are narrow [C4].

New Zealand

Check company and individual agency licences, branches, supervision, trust arrangements and local franchise and fair trading duties. REA requires licensing for real estate agency work [C5].

Evidence needed for every market

- ☐ Local franchise and contract assessment including any required filing.
- ☐ Agency activity permissions and responsible people are verified.
- ☐ AML privacy advertising consumer and employment duties are assessed.

Chosen market local adviser and review date

Country conditions requiring a local supplement

The checks are starting points and are not an exhaustive legal checklist. W and each agency must review their actual conduct and preserve non-excludable obligations.

Australian franchise sources

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Official primary sources checked 4 October 2026. References identify the relevant guidance; final documents require a fresh local check.

A1 ACCC franchise agreement including classification and required terms

<https://www.accc.gov.au/business/industry-codes/franchising-code-of-conduct/the-franchise-agreement>

A2 Current Competition and Consumer Industry Codes Franchising Regulations 2024

<https://www.legislation.gov.au/F2024L01605/latest>

A3 ACCC information statement for prospective franchisees

<https://www.accc.gov.au/business/industry-codes/franchising-code-of-conduct/the-information-statement-for-prospective-franchisees>

A4 ACCC information and document obligations

<https://www.accc.gov.au/business/industry-codes/franchising-code-of-conduct/information-and-document-obligations-under-the-franchising-code>

A5 ACCC franchise disclosure document

<https://www.accc.gov.au/business/industry-codes/franchising-code-of-conduct/franchise-disclosure-document>

A6 ACCC franchise disclosure register

<https://www.accc.gov.au/business/industry-codes/franchising-code-of-conduct/franchise-disclosure-register>

A6a ACCC new register form effective 30 March 2026

<https://www.accc.gov.au/about-us/news/media-updates/accc-updates-the-form-and-manner-of-the-franchise-disclosure-register>

Use the current register form for new or updated profiles. A register listing is information published by the franchisor and does not establish government endorsement.

Australian conduct and agency sources

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A7 ACCC ending a franchise agreement

<https://www.accc.gov.au/business/industry-codes/franchising-code-of-conduct/ending-a-franchise-agreement>

A8 ACCC acting in good faith

<https://www.accc.gov.au/business/industry-codes/franchising-code-of-conduct/acting-in-good-faith-under-the-franchising-code>

A9 ACCC specific purpose funds

<https://www.accc.gov.au/business/industry-codes/franchising-code-of-conduct/specific-purpose-funds-for-franchise-businesses>

A10 ACCC contracts and unfair contract terms

<https://www.accc.gov.au/business/selling-products-and-services/contracts>

A11 ACCC false or misleading claims

<https://www.accc.gov.au/business/advertising-and-promotions/false-or-misleading-claims>

A12 ACCC consumer rights and guarantees

<https://www.accc.gov.au/consumers/buying-products-and-services/consumer-rights-and-guarantees>

B1 CAV Victorian company estate agent licensing

<https://www.consumer.vic.gov.au/licensing-and-registration/estate-agents/licensing/apply-for-a-licence/company>

B2 CAV office management and staffing

<https://www.consumer.vic.gov.au/licensing-and-registration/estate-agents/running-your-business/office-management-and-staffing/managing-an-estate-agency-office>

B3 NSW corporation licence for property agencies

<https://www.nsw.gov.au/business-and-economy/licences-and-credentials/becoming-a-property-agent/corporation-licence>

Agency and international sources

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B4 CAV future registration and CPD changes

<https://www.consumer.vic.gov.au/licensing-and-registration/estate-agents/new-rules-estate-agents-and-agents-representatives>

B5 AUSTRAC real estate designated services

<https://www.austrac.gov.au/new-austrac/designated-services-newly-regulated-entities/real-estate-designated-services>

B5a AUSTRAC obligations commenced 1 July 2026

<https://www.austrac.gov.au/news-and-media/media-release/anti-money-laundering-and-counter-terrorism-laws-cover-thousands-more-businesses>

C1 Australian Business Register W Agent Pty Ltd

<https://abr.business.gov.au/ABN/View?id=56701552730>

C2 Current United States federal franchise rule

<https://www.ecfr.gov/current/title-16/chapter-I/subchapter-D/part-436>

C3 California DRE corporate real estate licences

<https://www.dre.ca.gov/licensees/Corporation.html>

C4 HMRC estate agency guidance including franchise models

<https://www.gov.uk/hmrc-internal-manuals/anti-money-laundering-guidance-for-supervised-businesses/amlg2200>

C5 New Zealand REA company licensing

<https://www.rea.govt.nz/assets/Uploads/Resources/Forms/Licensing-forms/Getting-a-real-estate-company-licence.pdf>

Sources checked 4 October 2026. Verified ABN and ACN establish entity identifiers. This pack makes no claim that W Agent Pty Ltd holds a corporate estate agent licence. Other countries and Australian jurisdictions require additional sources.