



BUSINESS LEGAL LIFECYCLE

Enhance your knowledge of key legal issues affecting business clients

A self-paced eLearning course for Accountants, Managers and Partners in public practice | 12 Modules | 18 CPD Hours

First point of contact for legal issues

From start-up to growth and succession, the accountant is often the first point of contact when business owners need advice on legal matters. Often, this advice requires a sound understanding of legal matters in relation to business structuring, financial contracts, workplace agreements, property investment and succession planning.

Of course, accountants are not (generally) legal advisors. However, with a good understanding of legal issues affecting their business clients, they can engage in effective conversations to identify key issues and suggest next steps. With this knowledge, they can effectively manage the relationship with external legal advisors.

What's this course all about?

This course is designed for accountants, managers and partners of accounting and advisory firms who are interested in helping business owners identify key legal issues so that they can seek the best solutions. Through this process, accountants will enhance their role as business advisors.

Over 12 modules, Jeremy Streten, author of 'The Business Legal Lifecycle' and Legal Practice Director of SMS Law will take you through a step by step process that identifies and discusses all key legal issues that business owners will experience as they proceed through the lifecycle of their business.

THE BUSINESS LEGAL LIFECYCLE

Business owners need to understand a range of key legal matters as they grow their business. If they don't take care of their legal obligations and plan for the inevitable problems that will surface, they may be exposing themselves to strain, stress, loss of business and, potentially, bankruptcy.

Some of the key legal questions that business owners should consider include:

- What key business structures and director roles should I consider and why?
- How should you establish and maintain employee agreements?
- When should intellectual property be protected and what's the best way to do this?
- What are key legal considerations for bringing investors or shareholders into the business?
- What should I look for when buying a business or becoming a franchisee?
- What are the important legal factors to consider when buying property within a business?
- How can I deal effectively with legal disputes and debtor collection?
- What are the key considerations when I want to sell my business?
- What are the key considerations if I am considering business or personal insolvency?

WHAT'S THIS COURSE ALL ABOUT?

This eLearning course is designed to provide partners, managers and accountants in public practice with a sound appreciation of business legal issues so that they can point their business clients in the right direction.

Over 12 modules, we'll discuss key aspects of the Business Legal Lifecycle and provide advice on how these issues should be addressed in an advisory capacity, whether directly or through a legal specialist.

Each module incorporates a formal video presentation, a workbook, support material and assessment tasks. Most importantly, learners develop their own professional development pathway using our SMART action planning template.

WHO'S IT FOR?

This course is designed for accountants, managers and partners of accounting and advisory firms who are interested in helping business owners identify key legal issues so that they can seek the best solutions. Through this process, accountants will enhance their role as business advisors with clients

For Registration details:

<https://cpdforaccountants.com.au/courses/business-legal-lifecycle>

COURSE CONTENT

This course consists of 12 modules:

1. Start-up business – Structure and responsibilities for business owners

- a. Legal liability of different structures
- b. Key director responsibilities and liabilities
- c. Common mistakes when becoming a franchisee

2. Client engagement – Customer and supplier issues and agreements

- a. The importance of having an agreement with all clients
- b. The key features of a debt collection procedure
- c. PPSR common pitfalls, tips and tricks

3. Workplace policies – Putting in place employee and contractor policies

- a. The importance of having employment agreements
- b. Key features of a workplace policy including emerging trends
- c. Employee vs contractor - Key differences and examples

4. Intellectual property – Ensuring that the right IP protection is in place

- a. When you need to register a trademark
- b. How to set up a separate entity to hold intellectual property
- c. The importance of how-to guides in any business

5. Business investors – How to properly bring investors into a business

- a. What to look for in an investor
- b. The key features of a good shareholder agreement
- c. When you need a joint venture agreement

6. Business expansion – Focus on challenges faced when growing a business

- a. What to look out for when buying a business
- b. Franchisors and misleading and deceptive conduct
- c. Franchising vs Licencing, which one is right?

7. Estate planning – Establishing the right estate planning practices for any business

- a. What constitutes a will and why you need one
- b. The importance of putting the right power of attorney in place
- c. The key features of a buy-sell option agreement

8. Property investment – Putting the right structures in place to invest in property

- a. Why property should be held in different entities
- b. Importance factors to consider when buying a property
- c. The conveyancing process explained

9. Dispute resolution – How to deal with litigation and dispute resolution procedures

- a. What do I do when a client has been sued?
- b. Dealing effectively with debt collectors
- c. My client is owed money, what information do they need?

10. Business sale – What business owners need to do to sell their business

- a. When is a business ready for sale?
- b. What to do if my client wants to see part of their business
- c. The process of selling a business explained



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COURSE CONTENT

This course consists of 12 modules:

11. Retirement planning – Helping business clients in the transition to retirement

- a. Common issues with earn out agreements
- b. When does my client need to revisit their will?
- c. Fundamentals of SMSF buying property

12. Insolvency and bankruptcy – Dealing with insolvency and winding up the right way

- a. Outline of the insolvency process for individuals and companies
- b. Questions to ask someone who is considering bankruptcy
- c. What is a preference claim and what needs to happen?

CPD – This course is worth 18 CPD hours

All modules are structured with specific learning objectives and assessment tasks. Learners are expected to demonstrate that they understand learning objectives and can apply concepts through completion of the assessment tasks.

Jeremy Streten, your expert facilitator, will be available to answer general questions that assist with your professional development.



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OUR LEARNING PROCESS

Our self-paced eLearning courses follow a 4-step process in relation to learning objectives:



THE ELEARNING ACADEMY

- Learners can complete courses at a place that suits them, within and outside work hours
- Each learner will have a dedicated login to give them personal access to their course
- Module material includes online presentations, workbooks, PowerPoint Slides, templates, scripts and articles
- All modules also incorporate formal qualitative assessment tasks that encourage learners to develop practical actions demonstrating understanding of the concepts
- All assessment tasks are scored, with directed feedback to learners on their response
- As the learner progresses, they develop their personal SMART action list to drive change
- Managers are able to see at a glance how their staff are progressing
- All learners have access to course content for 12 months following their enrolment

FEEDBACK FROM PREVIOUS COURSE LEARNERS*

I have found this course well-structured to introduce me to consulting in financial services analysis. I have gained valuable technical knowledge from the presentation and course materials. I am confident that I can apply what I have learnt in my practice.

I found the course provided a great overview of different analytical tools and strategies to better engage with our client. It gave focus and structure to enable me to actually put the tools in place, rather than being distracted by my regular day-to-day work.

This course has been a great investment. In time I hope to implement everything I learned, but, to be honest, implementing just some learned points is a big strive forward for my business. This course will help my clients, which in turn, will help my business. Helping my clients improve their businesses is good business for me. This course has been the best professional development I have done to help my clients in this way.

*Business Analyst and Virtual CFO eLearning Courses

For more course feedback, visit

<https://cpdforaccountants.com.au/course-feedback>

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