

Course : Drafting of sales mandates, search mandates and preliminary sales agreements

Practical course - 1d - 7h00 - Ref. IMD

Price : 970 CHF E.T.

NEW

When it comes to real estate transactions, the drafting of preparatory documents is a decisive step, both legally and commercially. These essential documents define the relationship between the parties, secure the transaction and determine its validity.

Teaching objectives

At the end of the training, the participant will be able to:

- ✓ Identify the different types of mandates (sales and research)
- ✓ Draft a mandate that complies with the legal and regulatory framework
- ✓ Ensuring the legal security of a mandate through appropriate clauses
- ✓ Understanding the structure and legal scope of a sales agreement
- ✓ Draw up a clear, complete and secure sales agreement
- ✓ Identify and avoid common errors in these documents

Intended audience

Real estate agents, sales representatives, salaried and self-employed real estate professionals

Prerequisites

Connaissances de base en transaction immobilière
Notions juridiques générales (vente, parties, biens)

PARTICIPANTS

Real estate agents, sales representatives, salaried and self-employed real estate professionals

PREREQUISITES

Connaissances de base en transaction immobilière

Notions juridiques générales (vente, parties, biens)

TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more. Participants also complete a placement test before and after the course to measure the skills they've developed.

Practical details

Hands-on work

études de cas réels atelier de rédaction échanges d'expériences

Teaching methods

active

Course schedule

1 The legal framework for real estate mandates

- Understanding the definition and role of the mandate
- Learn about the Hoguet and Solidarité et Renouvellement Urbain laws (SRU)
- Drawing up a written mandate with obligations and sanctions
- Master the different types of mandate: simple, exclusive and semi-exclusive

Hands-on work

interactive presentation, discussion

2 Drafting of sales and search mandates

- Knowing the obligatory terms of the sales mandate and the search mandate
- Identify the different parties involved (principal, agent) in the sales mandate
- Draw up the property designation, price and fees, term of mandate, and master specific clauses.
- Be aware of certain recurring situations and classic points of vigilance in the search mandate.

Hands-on work

analysis and drafting of sales and search mandates

3 The preliminary sales agreement: general principles

- Understanding the definition and legal value of a compromise agreement
- Identify the difference between a compromise and a unilateral promise
- Master the conditions of validity
- Knowing the obligations of the parties

Demonstration

presentation + Q&A

Dates and locations

REMOTE CLASS

2026 : 10 June, 9 Sep., 2 Dec.

TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.