



Keyspire[®]

Signature

Mastermind Program

Lifestyle Freedom
Workshop



Agenda

Lifestyle Freedom Workshop

Part One: Lifestyle Freedom Mindset

What is Lifestyle Freedom?	8
Lifestyle by Default vs Lifestyle by Design	9
Designed Lifestyle Wish List	10
Designed Lifestyle Wish List Sample	11
The Lifestyle Designer™	12 - 13
The Lifestyle Designer™ Sample	14 -15

Part Two: The Portfolio Maximizer™

The Portfolio Maximizer™	20
--------------------------------	----

Part Three: The Private Real Estate Dial™

The Private Real Estate Dial™	24
The Portfolio Maximizer™ Sample: Portfolio 1 - Investment Ratio 100/0	25
The Portfolio Maximizer™ Sample: Portfolio 2 - Investment Ratio 80/20	26
The Portfolio Maximizer™ Sample: Portfolio 3 - Investment Ratio 50/50	27
The Portfolio Maximizer™ Sample: Portfolio 4 - Investment Ratio 20/80	28

Part Four: The Building Blocks

The 3 Investing Streams™ & 6 Building Blocks	32
--	----

Part Five: The Investor Activity Dial™

The Investor Activity Dial™	36 - 37
Case Study Building Blocks	38
The Portfolio Maximizer™ Sample: Case Study - Fully Active 0	39
The Portfolio Maximizer™ Sample: Case Study - Blended 5	40
The Portfolio Maximizer™ Sample: Case Study - Fully Passive 10	41

Part Six: Reverse Engineering Your Portfolio

The Passive Income Engine™	46
Case Study - Bob and Jane	47
The Portfolio Maximizer™: Case Study - Bob and Jane	48
Your Turn: Build Your Portfolio	49
Case Study Building Blocks	50
The Portfolio Maximizer™	51 - 53
The Quarterly Focuser™	54

Post-Workshop Activities

The Success Scorecard™	58
Balanced Diversification	59



Mastermind Program

Ground Rules

- Have open and honest conversations
- This is all confidential
- No judgement environment
- Add value to your workshop group
- Have fun!

Mastermind Program **Goals**



Keyspire's Goal:

We help people live the life they love

The Mastermind Program Goal:

To reach your Lifestyle Freedom
Day

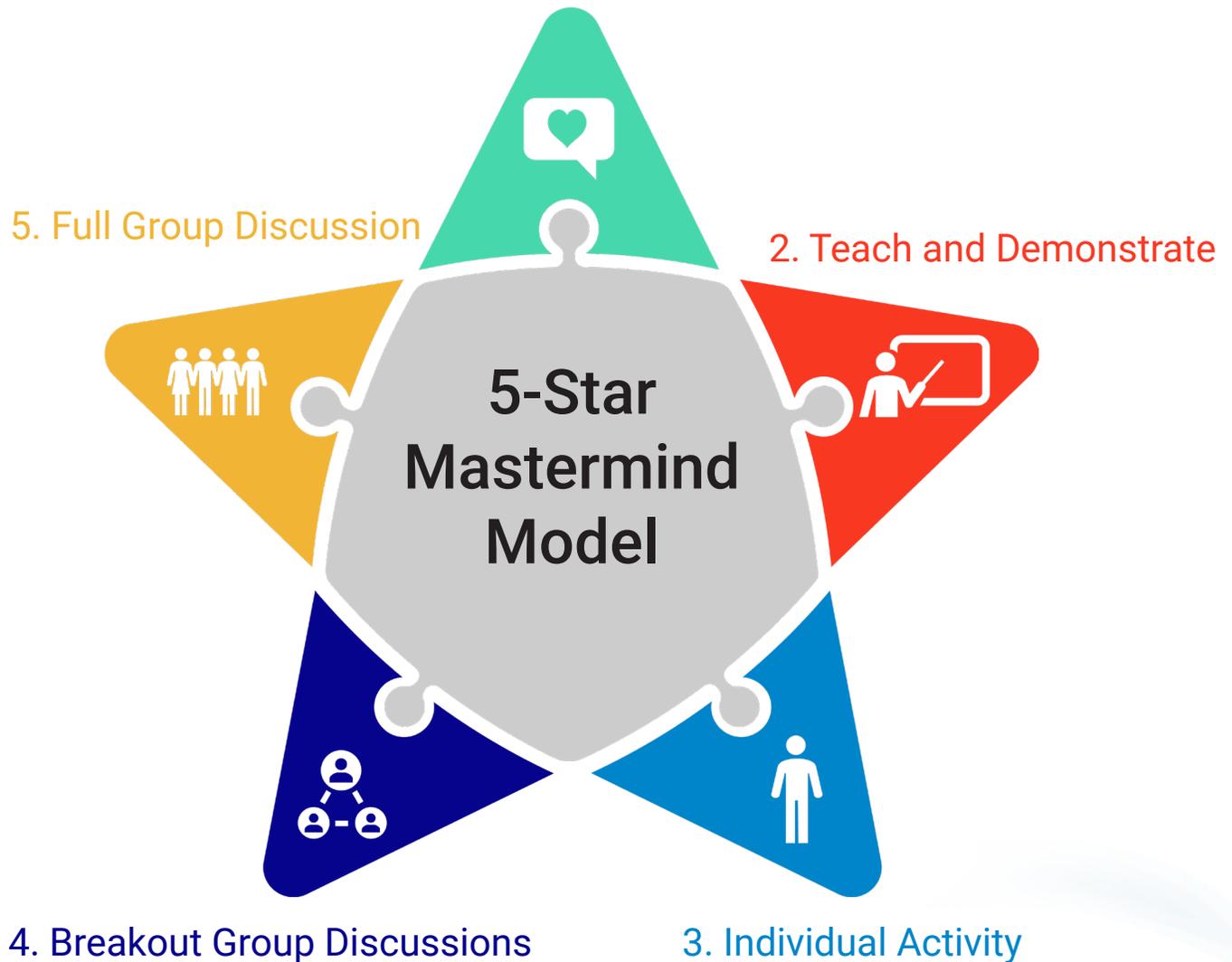
***“Being consistently good
creates more progress
than being occasionally
great”***

-Michael Sarracini



Keyspire's Unique 5-Star Mastermind Model

1. Story and/or Discussion Questions





Mastermind Member

9 Core Values



COMMUNITY



COACHABLE



MINDSET



ATTITUDE



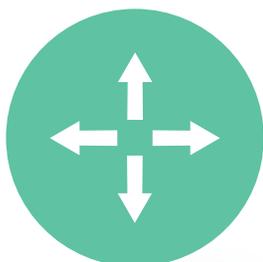
LIFESTYLE
FREEDOM



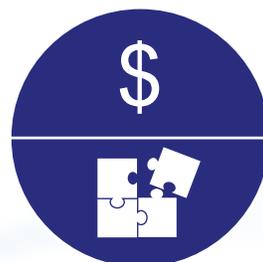
CONTROL



PATIENT



CHANGE



INCOME OR
DRIVE



PART ONE

Lifestyle Freedom Mindset



WHAT IS LIFESTYLE FREEDOM?

"You have so many tools and resources right in front of you to be successful – just put them in place."

- Michael Sarracini



Expand, Define, Think, Consider

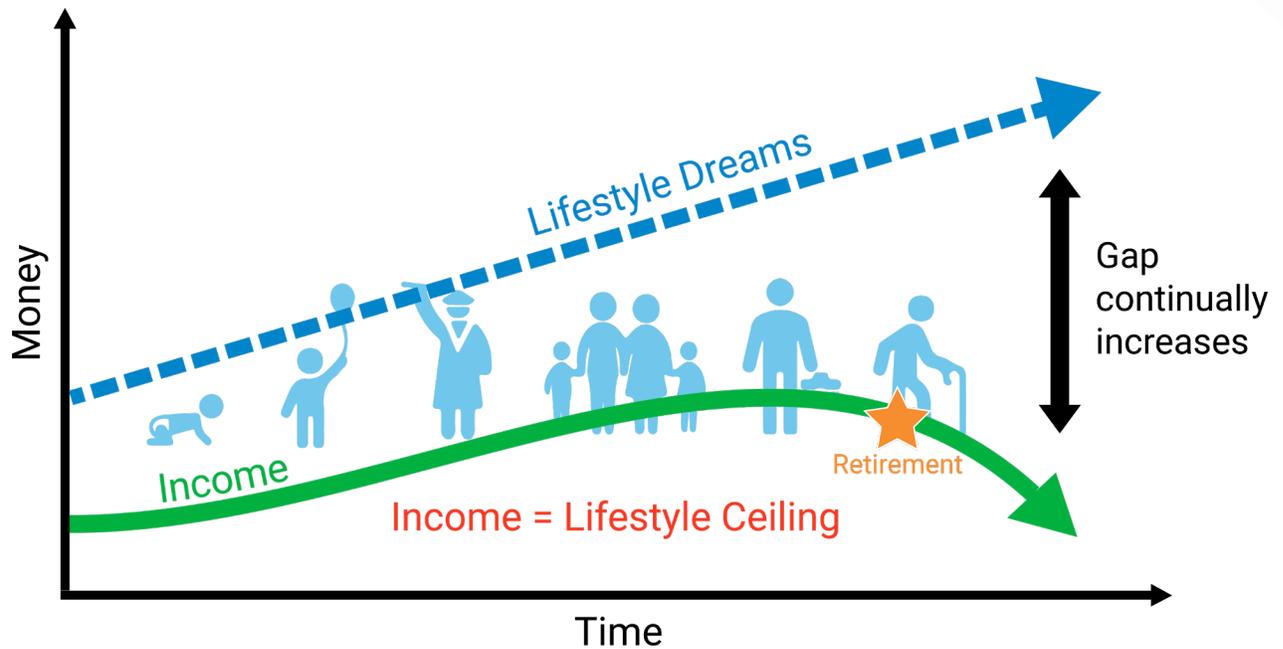
1 What's a positive focus from the last quarter?	2 What's currently <i>working</i> in your real estate investing business?
3 What's currently <i>not working</i> in your real estate investing business?	4 What are your expectations for today?
5 What is Lifestyle Freedom?	

Name:

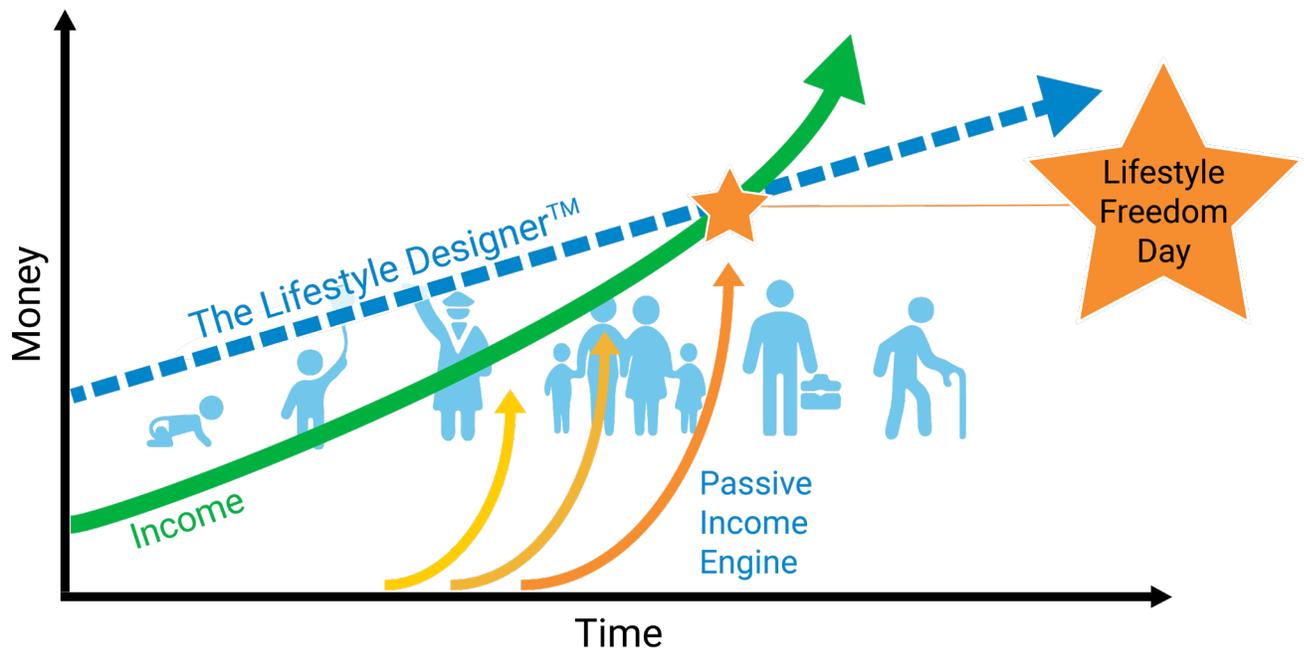
Date:



Typical Person: Lifestyle by DEFAULT



Keystone Members: Lifestyle by DESIGN



DESIGNED LIFESTYLE WISH LIST SAMPLE



What would my life look like if I could have everything I ever wanted?

HOME

- Renovate the kitchen
- Add pool
- Own a vacation property for personal use

HEALTH

- Believe in myself
- Eat healthy
- Meditate daily
- Run a marathon

WORK

- Work because I love to, not because I have to
- Spend more time on the phone with clients vs. doing admin work

COMMUNITY

- Be able to mentor somebody who is just starting out in real estate investing
- Contribute more to the development of Sick Kids Hospital

FAMILY

- Be more present to enjoy the everyday moments
- Have the kids and grandkids over for a family dinner once a week

FINANCE

- Be bad debt free!
- Let passive income support my family's needs and wants

LEARNING & DEVELOPMENT

- Learn how to manage a multi-family property
- Learn to play the piano

PLAY

- Go on a family vacation at least twice a year
- Join a soccer league

Name:

Date:



THE LIFESTYLE DESIGNER™ SAMPLE

Instead of a constricting budget, The Lifestyle Designer™ allows you to decide exactly what you want in life and the passive income required to achieve that lifestyle. To start, think of what you want **today**.

Survival: Covers your most basic needs, including shelter, food, and bills.

Comfort: Basic needs are covered plus some additional comforts in life.

Luxury: A life that is most fulfilling by having enough to make you happy.

	SURVIVAL	COMFORT	LUXURY	NOTES
	Annual	Annual	Annual	
Housing/Utilities				
Mortgage	\$10,000	\$25,850	\$25,850	
Property taxes	\$4,000	\$6,000	\$6,000	
Insurance	\$1,200	\$1,200	\$1,200	
Maintenance and repairs	\$500	\$1,000	\$1,000	
Utilities	\$2,000	\$3,000	\$3,000	
Internet	\$100	\$100	\$100	
Cell phone	\$50	\$75	\$100	
Transportation				
Vehicle payments	\$0	\$0	\$0	
Gas	\$3,000	\$3,000	\$3,000	
Auto insurance	\$2,000	\$2,000	\$2,000	
Registration fees	\$200	\$200	\$200	
Food and drinks				
Groceries	\$15,000	\$16,000	\$20,000	
Dining out & take-out	\$0	\$2,000	\$5,000	
Coffee	\$0	\$500	\$500	
Healthcare/Medical				
Health insurance	\$0	\$0	\$0	
Medical & prescriptions	\$0	\$0	\$0	
Dental & vision costs	\$0	\$0	\$0	
Personal Care				
Hair services	\$300	\$300	\$300	
Spa treatments (massages, nail care, etc.)	\$0	\$200	\$500	
Personal care items/products	\$200	\$200	\$200	
Gym membership	\$0	\$1,000	\$1,500	
Supplements	\$0	\$675	\$1,000	

Name:

Date:



	SURVIVAL	COMFORT	LUXURY	NOTES
	Annual	Annual	Annual	
Entertainment/ Subscriptions				
Streaming services	\$200	\$200	\$200	
Movie outings	\$0	\$500	\$500	
Event tickets	\$0	\$500	\$500	
Hobbies/crafts	\$0	\$500	\$500	
Education/Childcare				
Tuition/Daycare	\$0	\$0	\$0	
Camps	\$0	\$500	\$850	
Activities/Sports	\$0	\$5,000	\$5,000	
Books	\$0	\$0	\$0	
Real Estate Investing Education	\$10,000	\$12,000	\$15,000	
Pets				
Pet food/medication	\$0	\$0	\$0	
Gifts & Hosting				
Birthday & Holiday gifts	\$250	\$500	\$1,000	
Hosting costs	\$0	\$1,000	\$2,000	
Shopping				
Clothing, shoes, etc.	\$1,000	\$1,000	\$1,000	
Home decor	\$0	\$1,000	\$1,000	
Vacations				
International Travel	\$0	\$10,000	\$15,000	
Annual retreat with spouse	\$0	\$0	\$7,000	
Bonus				
Boat Payments	\$0	\$0	\$8,000	
Saving for new pool	\$0	\$0	\$15,000	
Pre-Tax Subtotal <i>Total of all expenses listed above</i>	\$50,000	\$96,000	\$144,000	
Blended Tax Rate Percentage	25%	25%	25%	
Tax Installments <i>Pre-Tax Subtotal x Your Blended Tax Rate</i>	\$12,500	\$24,000	\$36,000	
Total LFD Income Required <i>Pre-Tax Subtotal + Tax Installments</i>	\$62,500	\$120,000	\$180,000	

Name:

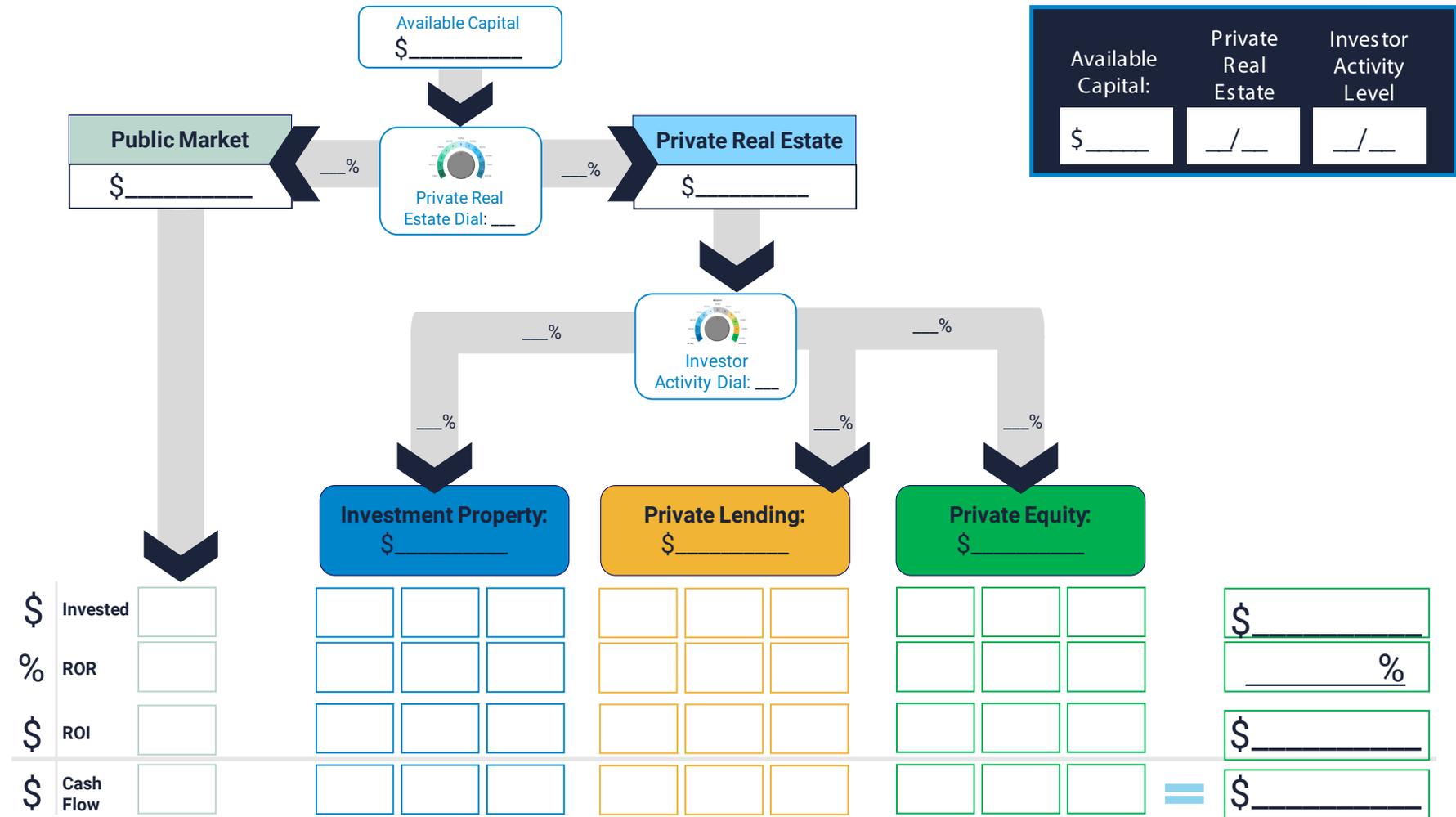
Date:



PART TWO

The Portfolio Maximizer™

THE PORTFOLIO MAXIMIZER™



20

Name:

Date:

The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.



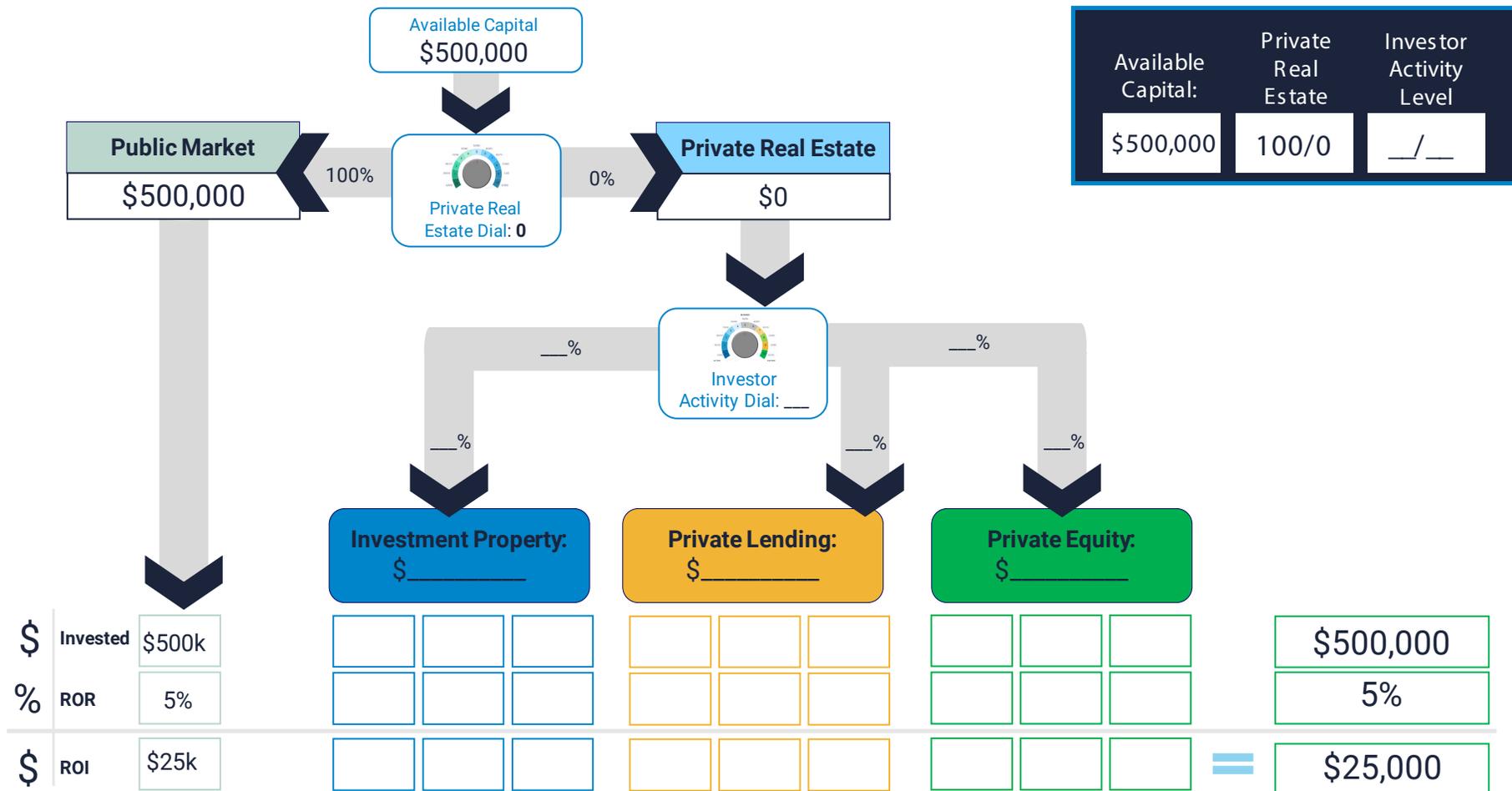
PART THREE

The Private Real Estate Dial™



THE PORTFOLIO MAXIMIZER™ SAMPLE

Portfolio 1 – Investment Ratio 100/0

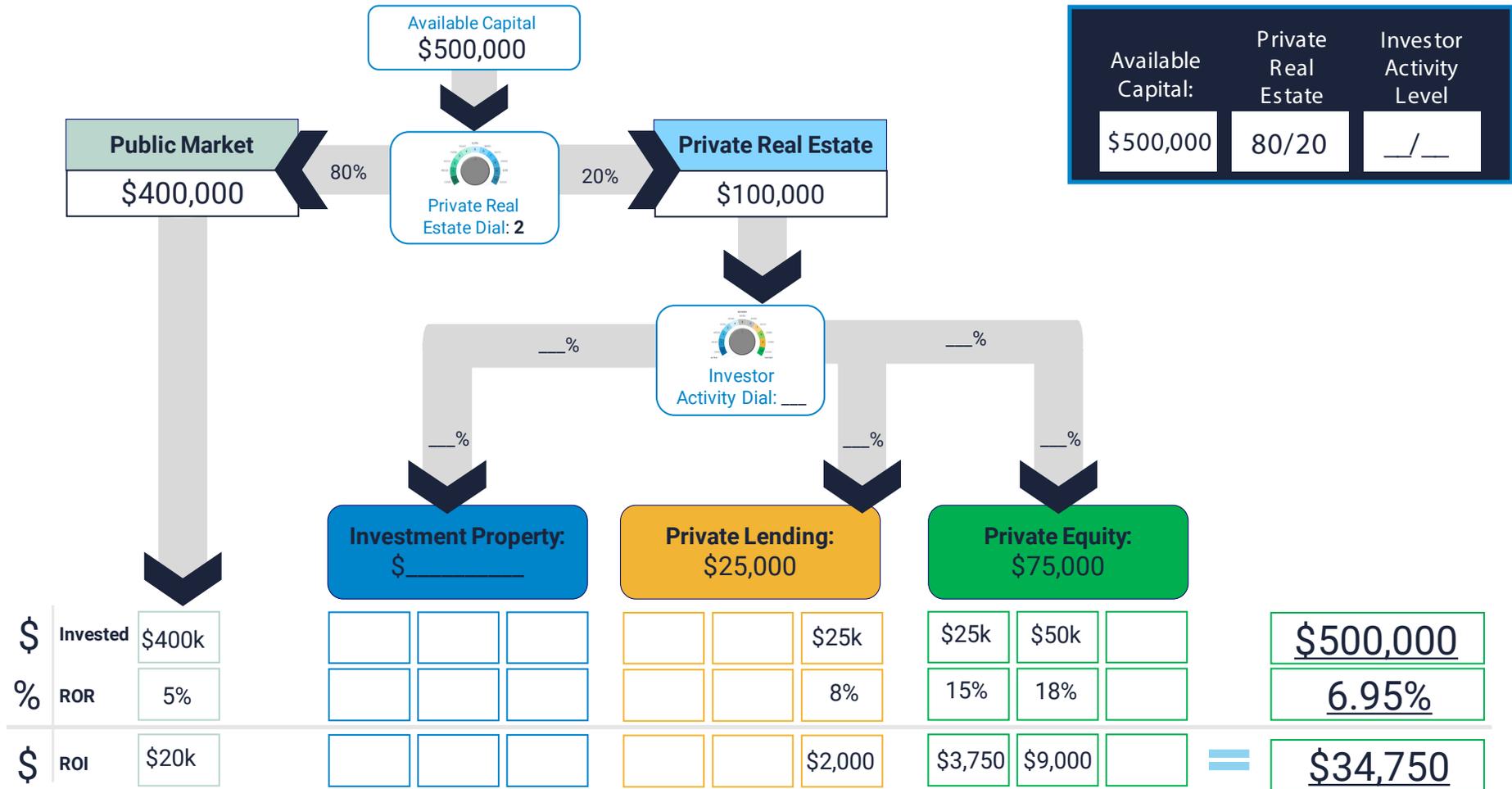


25

The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.

THE PORTFOLIO MAXIMIZER™ SAMPLE

Portfolio 2 – Investment Ratio 80/20

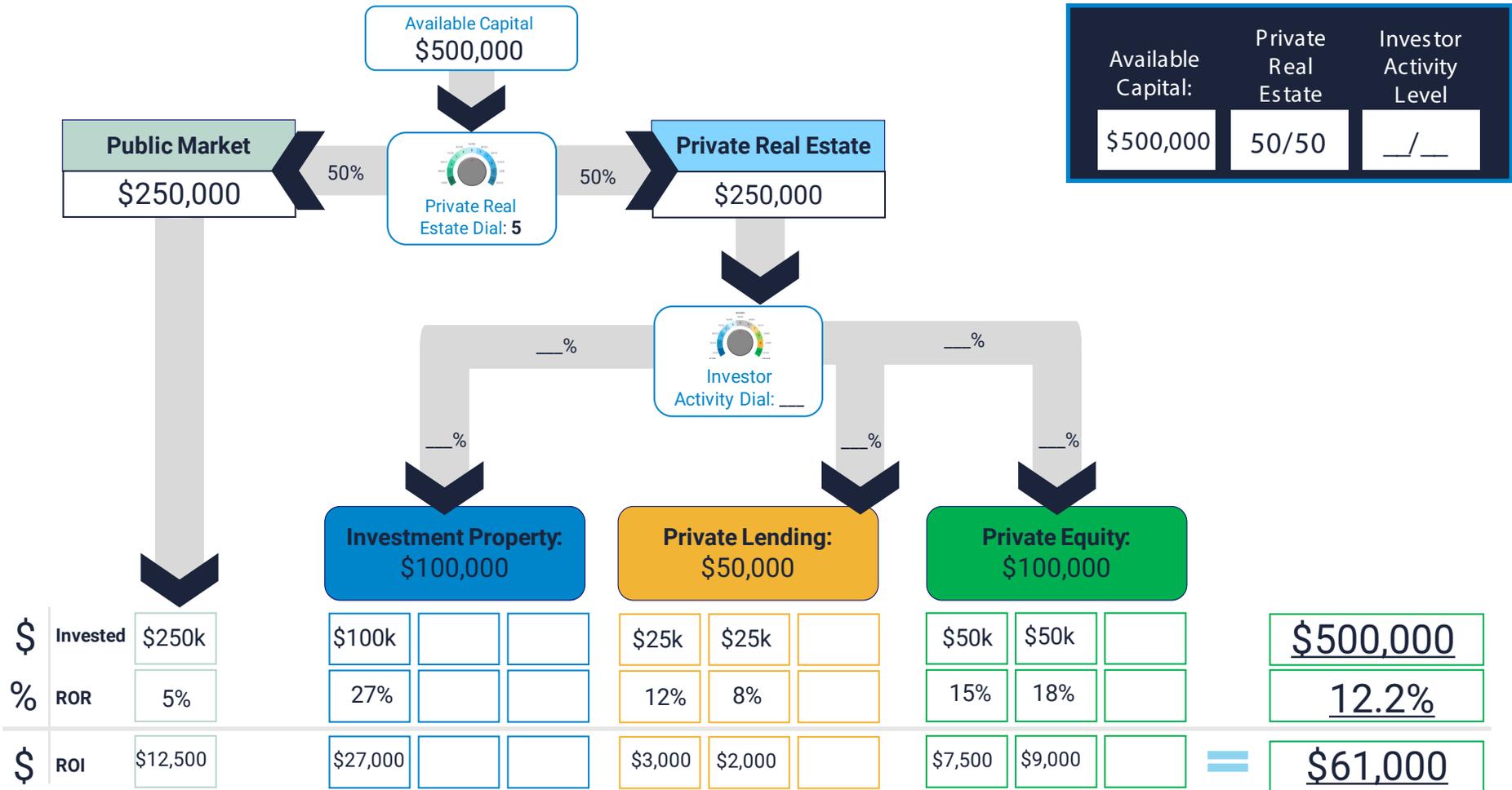


The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.



THE PORTFOLIO MAXIMIZER™ SAMPLE

Portfolio 3 – Investment Ratio 50/50

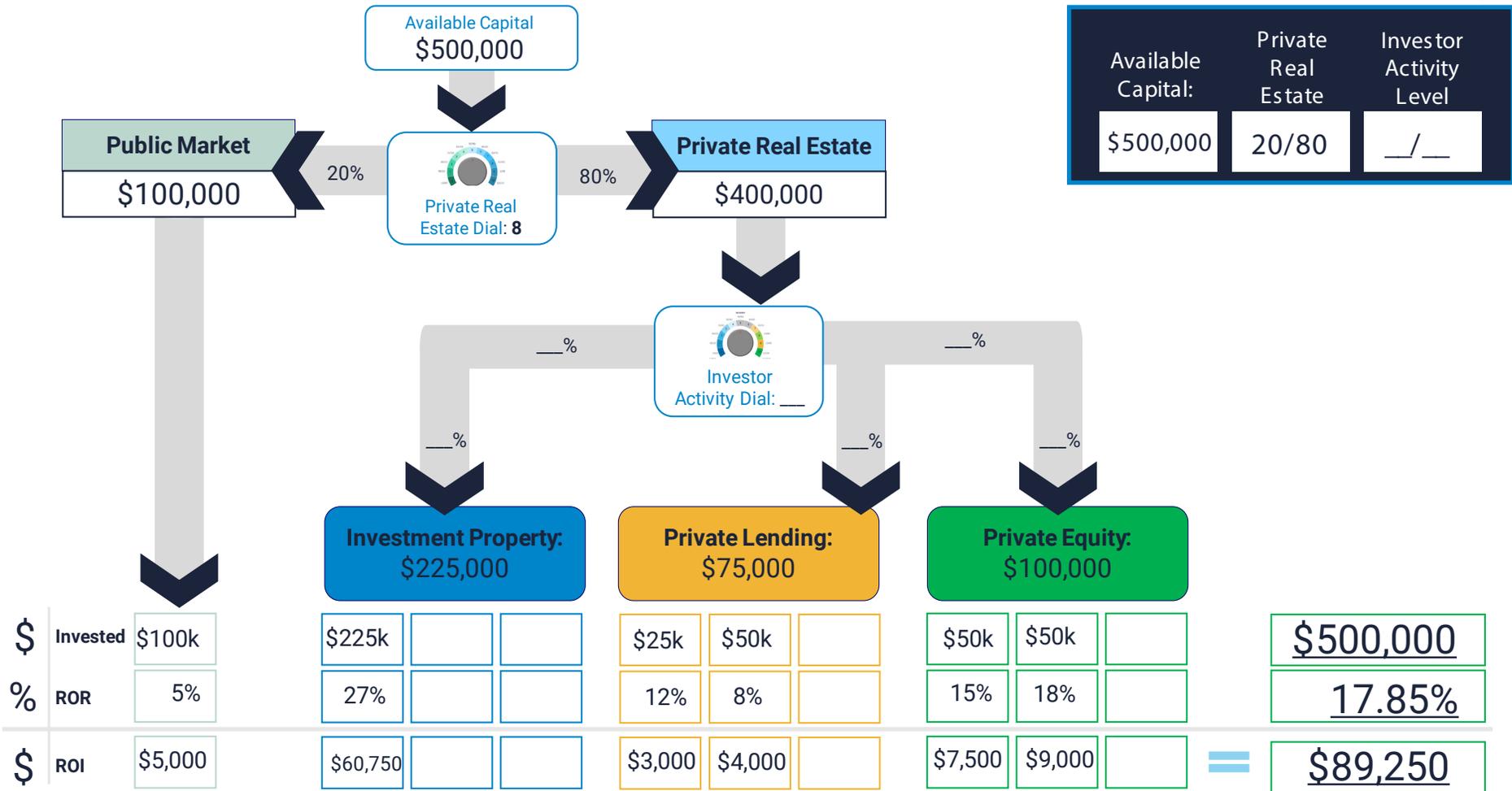


Available Capital:	Private Real Estate	Investor Activity Level
\$500,000	50/50	___/___

The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.

THE PORTFOLIO MAXIMIZER™ SAMPLE

Portfolio 4 – Investment Ratio 20/80



28

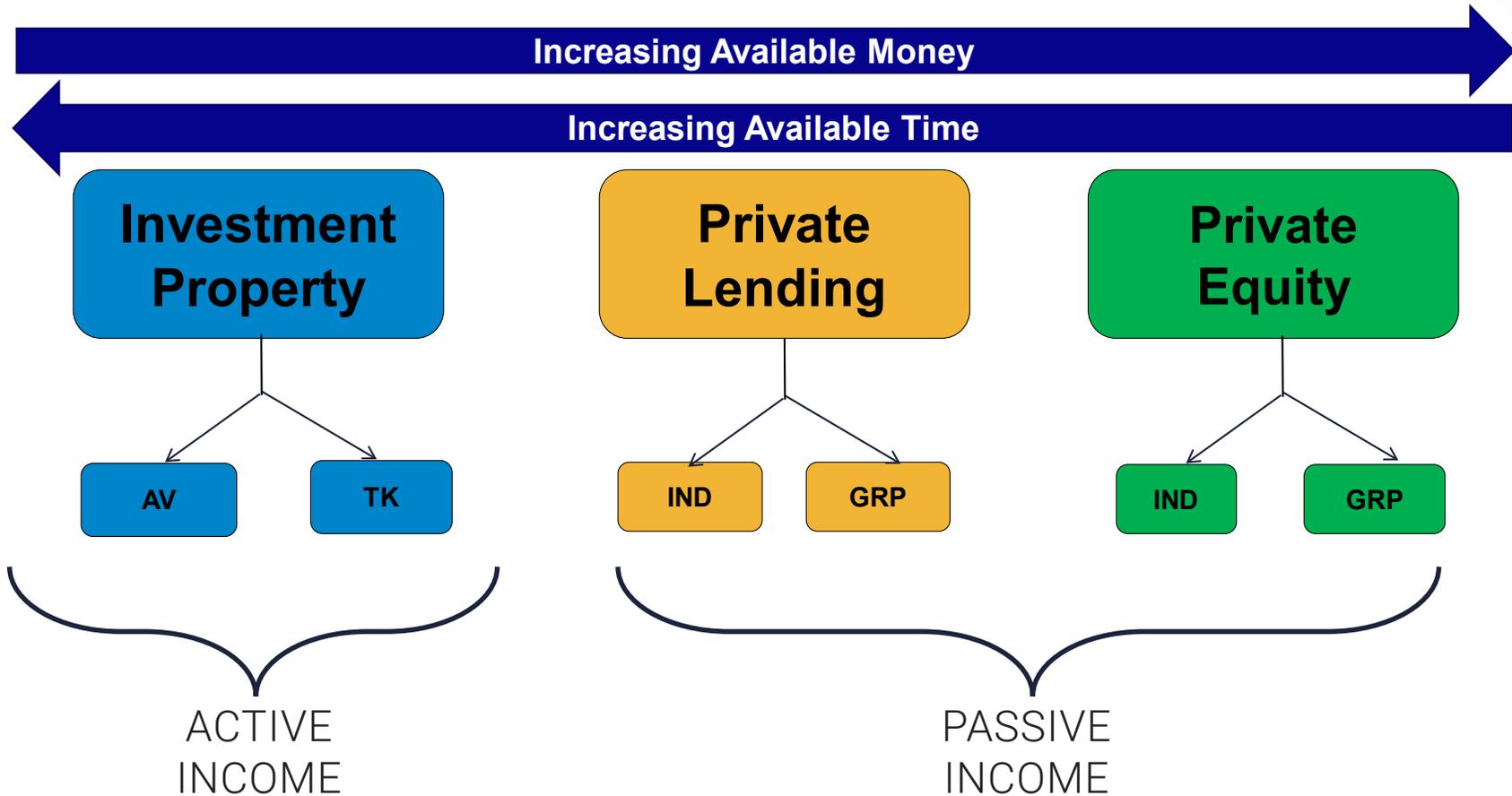
The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.



PART FOUR

The Building Blocks

THE 3 INVESTING STREAMS™ & 6 BUILDING BLOCKS



32

Name:

Date:

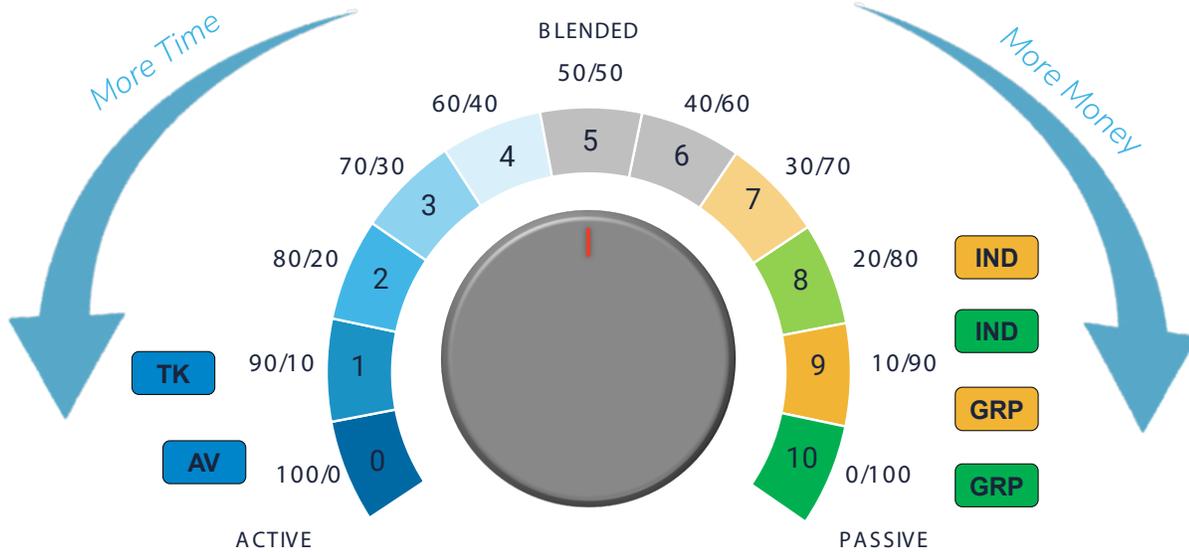
The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.



PART FIVE

The Investor Activity Dial™

THE INVESTOR ACTIVITY DIAL™



ACTIVE

You are "hands-on" in some, or all, of your investing activity. You usually work directly with some, or all, of the transaction team including realtors, contractors, appraisers, etc. You are responsible for making decisions that directly impact the activity of the investment. Your goals include being directly involved in some or all aspects of the investment activity.

Example: Your portfolio consists of rehab or income properties fully managed by you, and your activity consists of raising other people's money through private equity or private lending to acquire more property.



BLENDED

Your investment activity is a blend between active and passive. Your portfolio contains some investments that you are actively responsible to manage and/or make decisions for, and some investments that are fully passive and hands off.

Example: Your portfolio consists of a mix of income properties, rehab properties and/or turnkey properties along with private lending and/or private equity investments. You like to diversify along two or all three of the investing streams. Your activity consists of managing your total portfolio along with day-to-day management and/or decision making of property. Your total ROI is a blend of the active and passive investment returns.



PASSIVE

You are "hands-off" in your investing activity. You rarely work directly with the transition team (such as realtors, contractors, appraisers, etc.) You generally have little to no direct decision-making ability regarding the activity of the investment. You want to earn your return on investment with as little involvement as possible.

Example: Your portfolio consists of private equity investments, private lending investments, or income properties fully managed by someone else. Your activity consists of managing your passive portfolio for diversification and maximum returns.

CASE STUDY BUILDING BLOCKS



Investment Property

AV
22 Bay Ave.
40%

TK
14 Faircliffe Rd.
25%

AV
3 Mill St.
40%

TK
53 North Shore Trail
30%

Private Lending

GPL
Arrow Financial
8%

IPL
Keyspire Community
12%

IPL
Keyspire Community
15%

GPL
Right Guard Investments
10%

Private Equity

IPE
Keyspire Community
15%

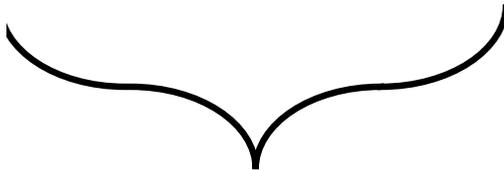
GPE
Mountain Capital
18%

GPE
Wealth First
15%

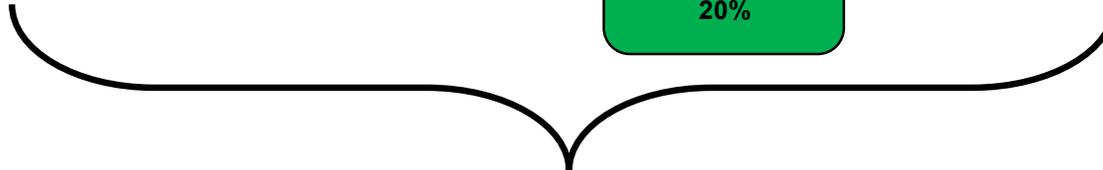
GPE
Pinnacle REIT
10%

GPE
Expand Fund
20%

38



ACTIVE INCOME



PASSIVE INCOME

The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.

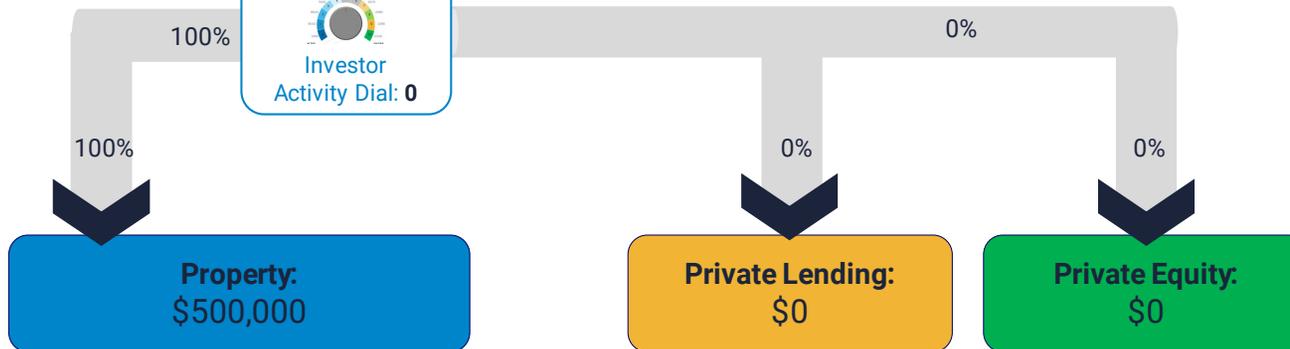


THE PORTFOLIO MAXIMIZER™ SAMPLE

Case Study – Fully Active 0



Available Capital:	Private Real Estate	Investor Activity Level
\$500,000	0/100	100/0



\$ Invested	\$150k	\$150k	\$100k	\$100k						\$500,000
% ROR	40%	40%	30%	30%						
\$ ROI	\$60,000	\$60,000	\$30,000	\$30,000						\$180,000

39

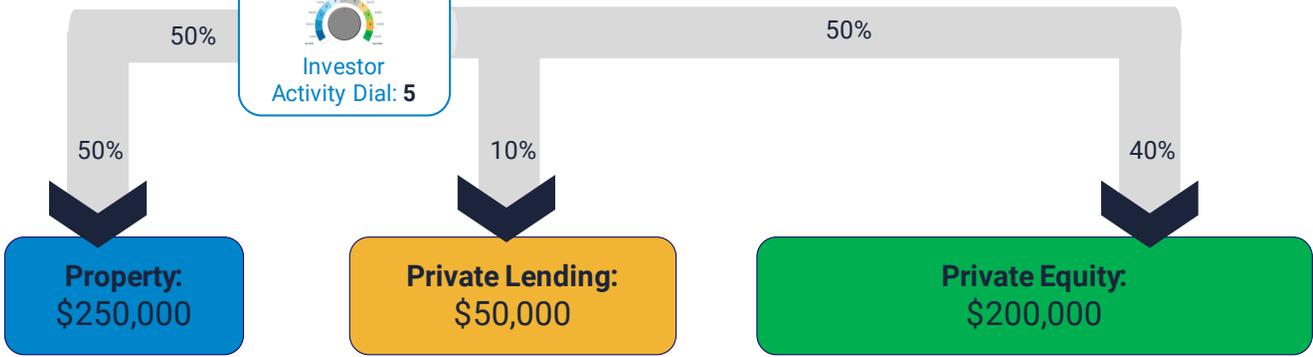
The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.

THE PORTFOLIO MAXIMIZER™ SAMPLE

Case Study – Blended 5



Available Capital:	Private Real Estate	Investor Activity Level
\$500,000	0/100	50/50



\$	Invested	\$150k	\$100k	\$25k	\$25k	\$25k	\$50k	\$50k	\$25k	\$50k	\$500,000
%	ROR	40%	30%	12%	8%	18%	15%	10%	20%	20%	
\$	ROI	\$60,000	\$30,000	\$3,000	\$2,000	\$4,500	\$7,500	\$5,000	\$5,000	\$10,000	\$127,000

40

The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.

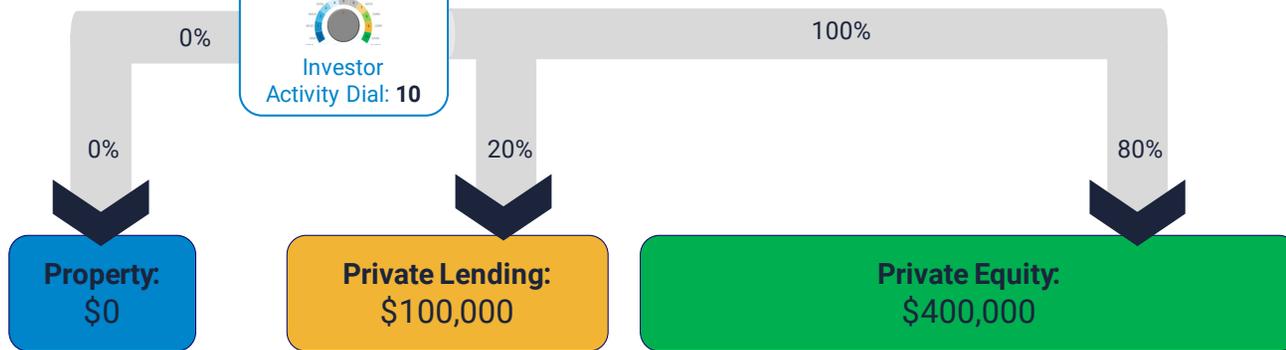


THE PORTFOLIO MAXIMIZER™ SAMPLE

Case Study – Fully Passive 10



Available Capital:	Private Real Estate	Investor Activity Level
\$500,000	0/100	0/100

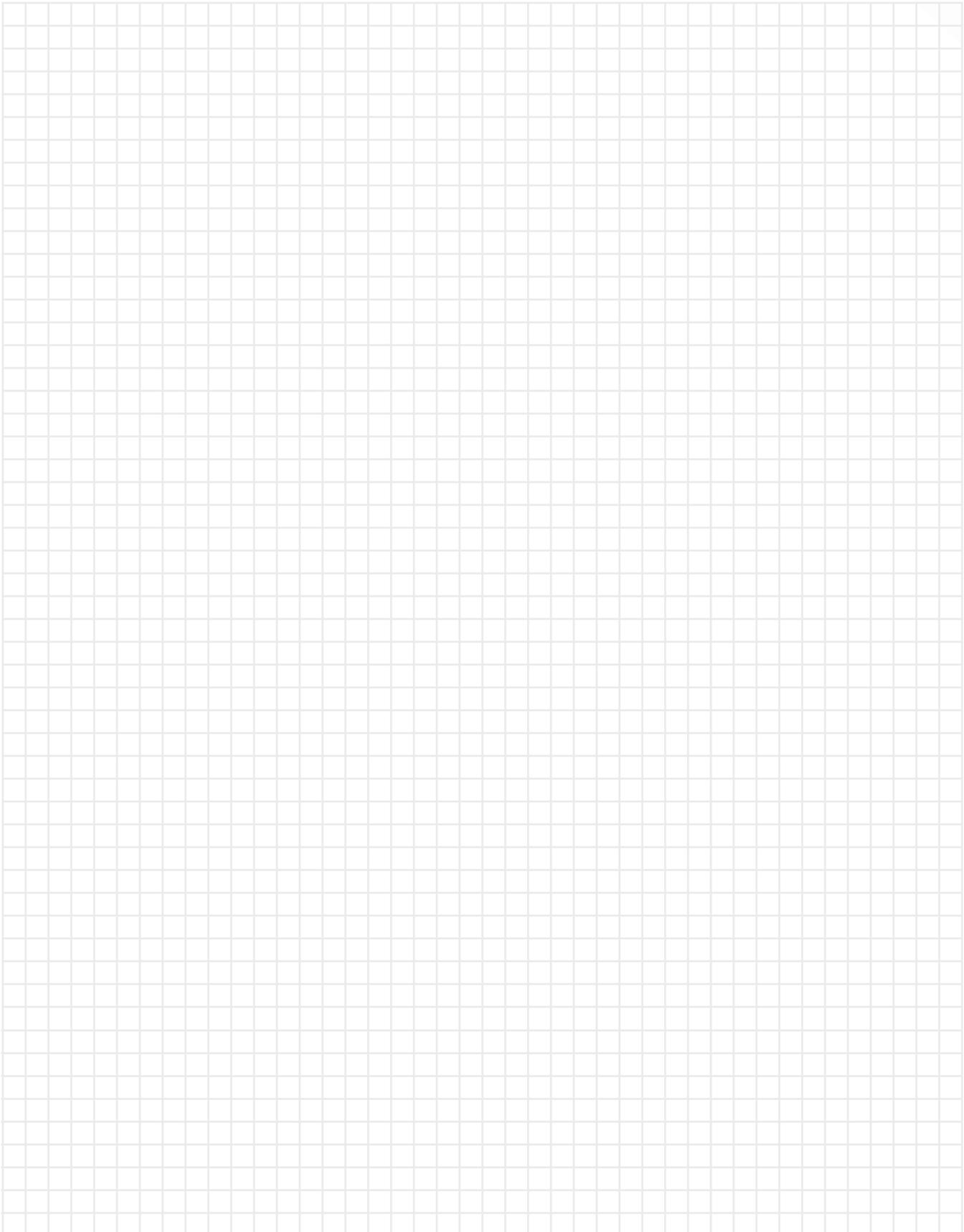


\$ Invested		\$50k	\$50k	\$150k	\$50k	\$50k	\$50k	\$50k	\$50k	\$500,000
% ROR		12%	8%	15%	18%	15%	10%	20%	20%	
\$ ROI		\$6,000	\$4,000	\$22,500	\$9,000	\$7,500	\$5,000	\$10,000	\$10,000	\$74,000

41

The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.

NOTES

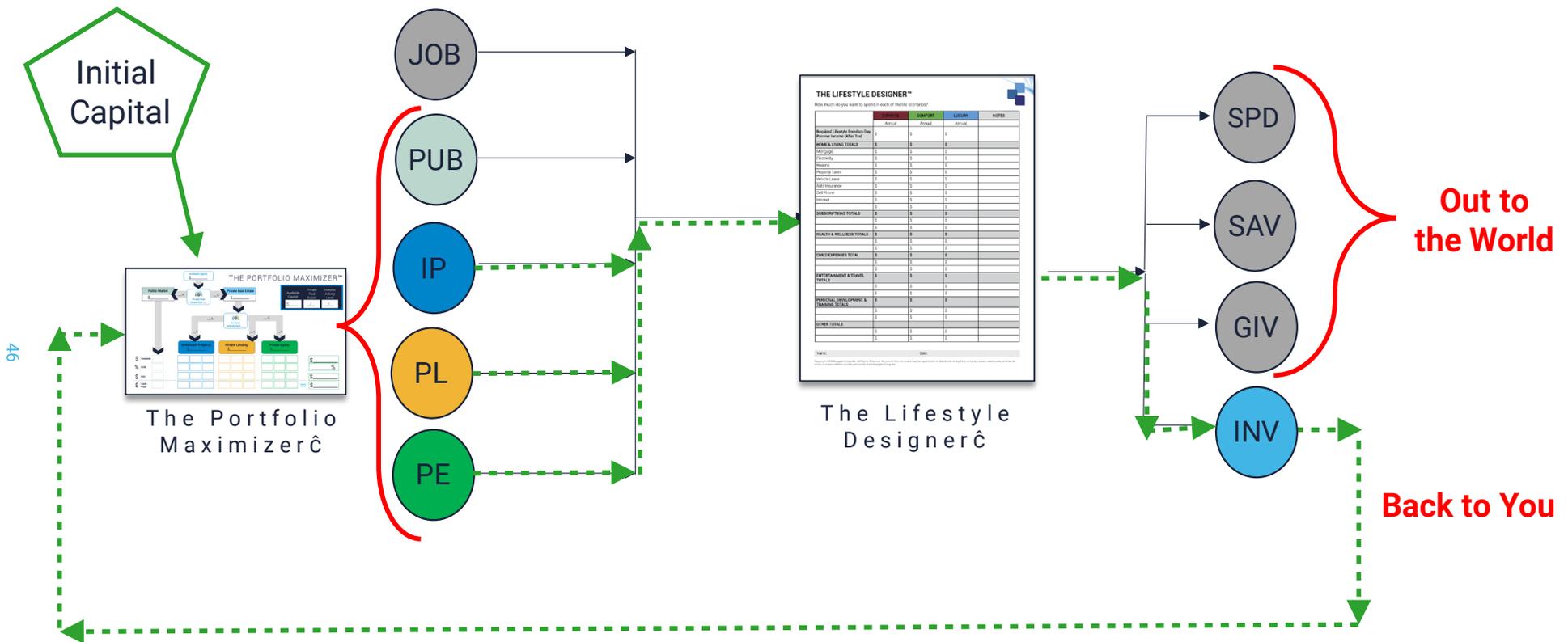




PART SIX

Reverse Engineering
Your Portfolio

THE PASSIVE INCOME ENGINE™



The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.

CASE STUDY - BOB AND JANE



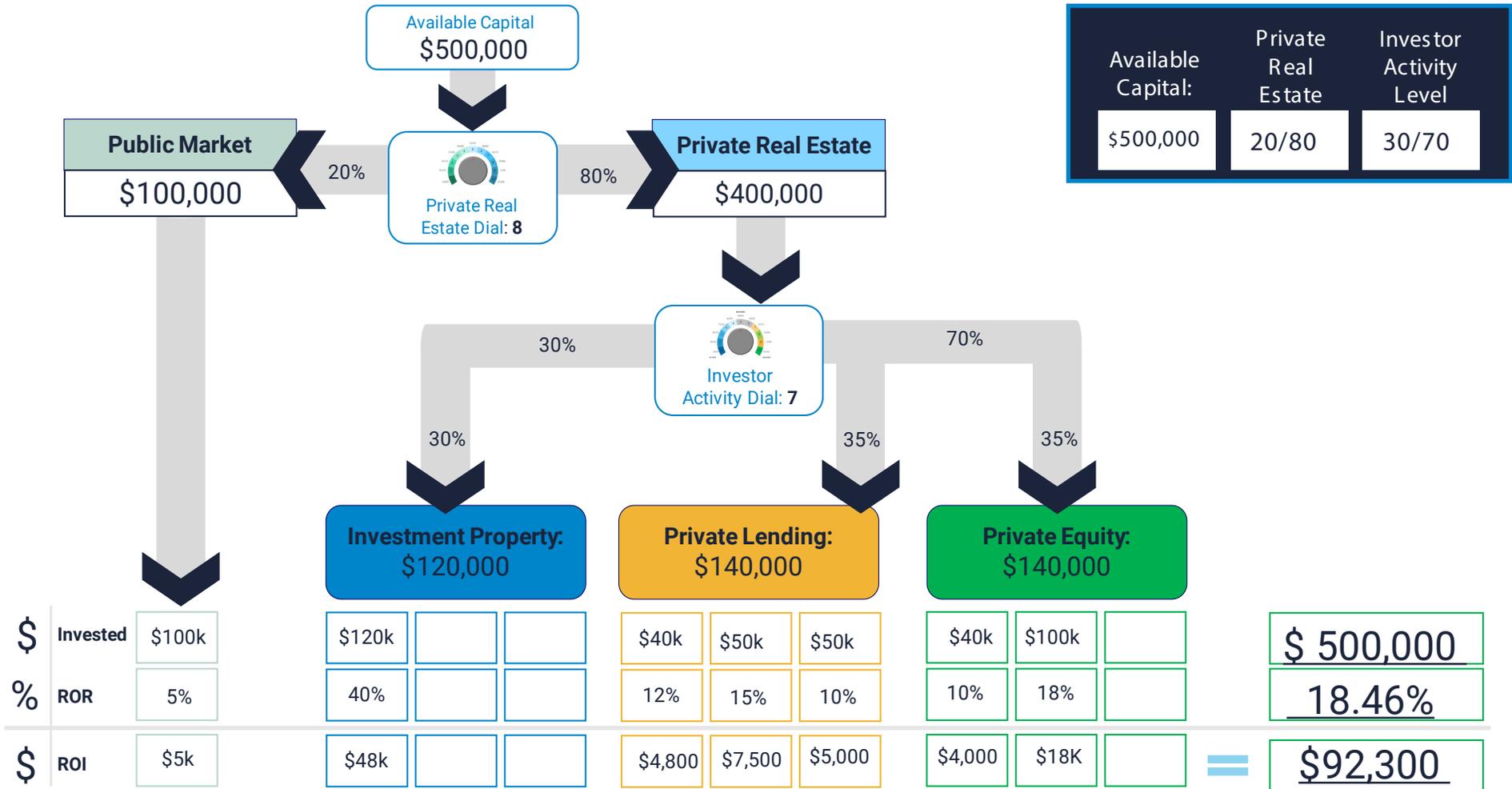
Chosen Lifestyle Freedom Day Required Income (also referred to as Required Investment Return)	\$120,000	1
Private Real Estate Dial™ number/ratio	8 (20/80)	2
Investor Activity Dial™ number/ratio	7 (30/70)	3
Placeholder for Available Capital (also referred to as Capital Invested)	\$500,000	4
Build Your Portfolio Using the “Case Study Building Blocks” on page 50 and the information above, build a portfolio in The Portfolio Maximizer. To calculate ROI (\$) for each investment: ROI (\$) = Investment amount x ROR (%)	--	
Calculate your Annual ROI (\$)	\$92,300	5
Calculate the Portfolio Blended Rate of Return ROR = $\frac{\text{Annual ROI (Box 5)}}{\text{Capital Invested (Box 4)}}$ = $\frac{\$92,300 \text{ (Box 5)}}{\$500,000 \text{ (Box 4)}}$ = 0.1846 x 100 = 18.46%	18.46%	6
Calculate your Lifestyle Freedom Day Required Capital LFD Investable Capital = $\frac{\text{LFD Required Income (Box 1)}}{\text{Portfolio Blended ROR (Box 6)}}$ = $\frac{\$120,000 \text{ (Box 1)}}{18.46\% \text{ (Box 6)}}$ = \$650,054	\$650,054	7
For Bob and Jane to generate an annual return of \$120,000 (Box 1) which is equal to their Lifestyle Freedom Day™, they will need to invest \$650,054 (Box 7) at an annual blended rate of return of 18.46% (Box 6).		

Name:

Date:

THE PORTFOLIO MAXIMIZER™

Case Study – Bob and Jane



48

The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.

YOUR TURN: BUILD YOUR PORTFOLIO



Chosen Lifestyle Freedom Day Required Income (pages 14-15) (also referred to as Required Investment Return)	\$ _____	1
Private Real Estate Dial™ “In One Year” number/ratio (page 24)	__ (__ / __)	2
Investor Activity Dial™ “In One Year” number/ratio (page 37)	__ (__ / __)	3
Placeholder for Available Capital (also referred to as Capital Invested)	\$500,000	4
<p>Build Your Portfolio</p> <p>Using the “Case Study Building Blocks” on page 50 and the information above, build a portfolio in The Portfolio Maximizer on page 51.</p> <p>To calculate ROI (\$) for each investment: ROI (\$) = Investment amount x ROR (%)</p>	--	
Calculate your Annual ROI (\$)	\$ _____	5
<p>Calculate the Portfolio Blended Rate of Return</p> <p>ROR = $\frac{\text{Annual ROI (Box 5)}}{\text{Capital Invested (Box 4)}}$</p> <p>= $\frac{\\$ \text{_____ (Box 5)}}{\\$ \text{_____ (Box 4)}}$</p> <p>= _____ x 100</p> <p>= _____ %</p>	_____ %	6
<p>Calculate your Lifestyle Freedom Day Required Capital</p> <p>LFD Investable Capital = $\frac{\text{LFD Required Income (Box 1)}}{\text{Portfolio Blended ROR (Box 6)}}$</p> <p>= $\frac{\\$ \text{_____ (Box 1)}}{\% \text{ (Box 6)}}$</p> <p>= \$ _____</p>	\$ _____	7
<p>To reach your Lifestyle Freedom Day Required Income of \$ _____ (Box 1), you will need to invest \$ _____ (Box 7) at an annual blended rate of return of _____ % (Box 6).</p>		

Name: _____

Date: _____

CASE STUDY BUILDING BLOCKS



Investment Property

AV
22 Bay Ave.
40%

TK
14 Faircliffe Rd.
25%

AV
3 Mill St.
40%

TK
53 North Shore Trail
30%

Private Lending

GPL
Arrow Financial
8%

IPL
Keyspire Community
12%

IPL
Keyspire Community
15%

GPL
Right Guard Investments
10%

Private Equity

IPE
Keyspire Community
15%

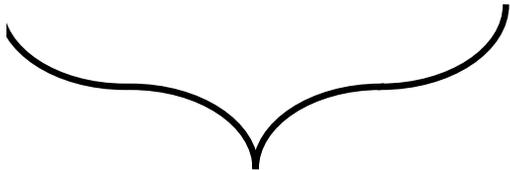
GPE
Mountain Capital
18%

GPE
Wealth First
15%

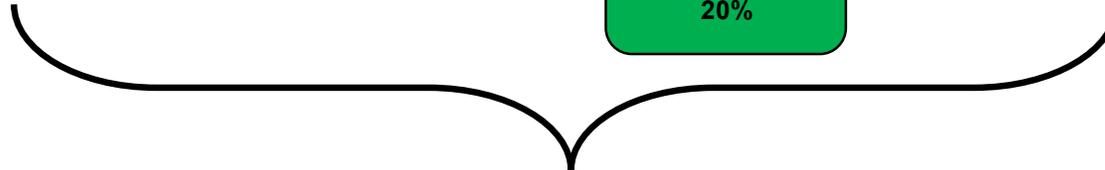
GPE
Pinnacle REIT
10%

GPE
Expand Fund
20%

50



ACTIVE INCOME

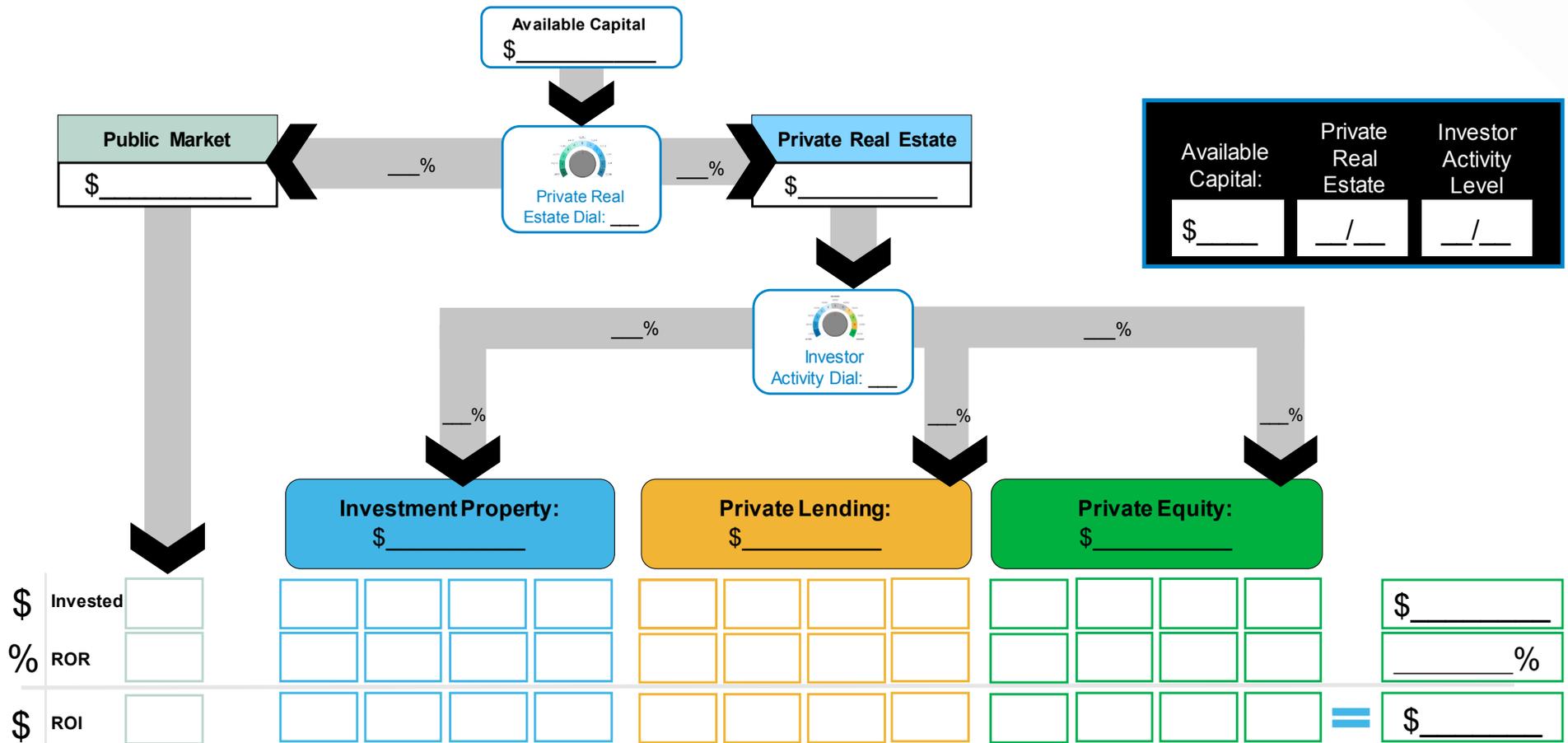


PASSIVE INCOME

The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.



THE PORTFOLIO MAXIMIZER™

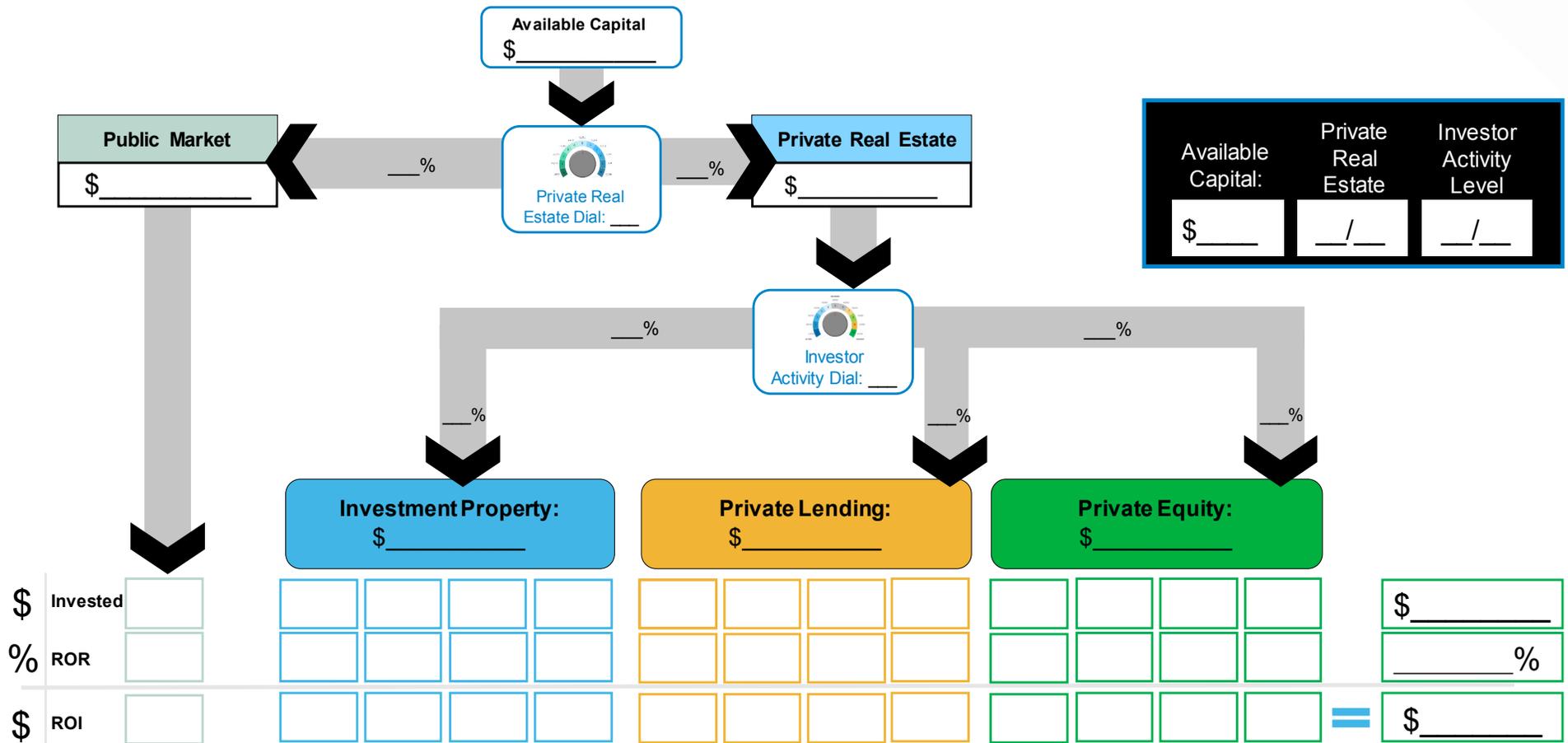


51

The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.



THE PORTFOLIO MAXIMIZER™

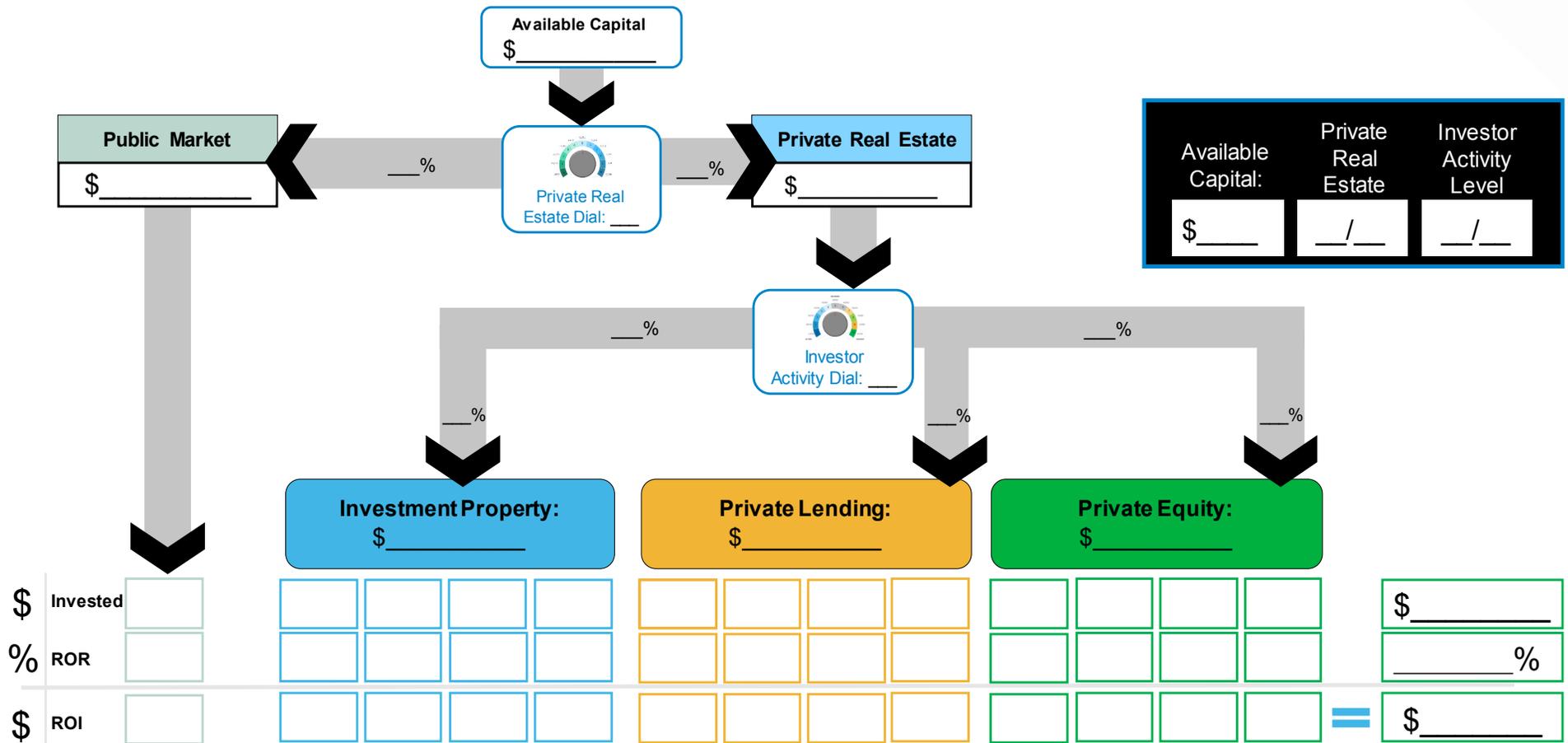


52

The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.



THE PORTFOLIO MAXIMIZER™



53

The information contained in this document is general in nature and provided as reference material only. It does not, nor is it intended to, provide legal, tax, real estate or financial advice, nor does it replace (or purport to replace) any need to obtain individual legal, tax, real estate or financial advice. Any legal, tax, real estate or financial advice about your own position or personal situation in relation to any matter covered in this document must always be obtained from a qualified legal, tax, real estate or financial professional familiar with your particular situation and circumstances. Copyright 2024 Keyspire Group Inc. All Rights Reserved. No part of this document may be reproduced or distributed in any form, or by any means whatsoever, whether in whole or in part, without written permission from Keyspire Group Inc.

THE QUARTERLY FOCUSER™



What were your greatest achievements over the last 90 days?	What's exciting you about your progress today?	What will you achieve over the next 90 days that you are most excited about?

Name:

Date:



POST- WORKSHOP ACTIVITIES

THE SUCCESS SCORECARD™



Year:	Quarter:	Date Range:
-------	----------	-------------

<i>I know I'm successful when...</i>	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Result
1														
2														
3														
4														
5														
6														
7														
8														
9														
10														

58

CELEBRATION REWARD:

IMPROVEMENT NOTES FOR NEXT QUARTER:

Name:	Date:
-------	-------



Your Lifestyle By Design

keyspire.com 1-888-556-2244
Investor Focused, Owned, & Operated

All rights reserved.

The text of this series of publications, or any part thereof, may not be reproduced in any manner whatsoever without the written permission from the authors.

Copyright © 2024

Disclaimer

Copyright© 2008-2023 Keyspire Group Inc. All Rights Reserved. KEYSPIRE, KEYSPIRE and design, KNOWLEDGE EMPOWERS YOU and certain other names, words, logos, slogans and images used in this material (collectively, the "Trademarks") are trademarks of Keyspire Group Inc. KEYSPIRE and KEYSPIRE and design are registered by Keyspire Group Inc. as trademarks in Canada and the United States. The Trademarks are used, and the related goods and services are distributed, in the United States by Invantage USA Inc. under license from Keyspire Group Inc. No portion of this material may be reused or reproduced without the prior written consent of such owner and distributor.

This publication is designed to provide accurate and authoritative information with regard to the subject matter covered. It is sold with the understanding that the publisher and authors are not engaged in rendering legal, accounting or other professional advice. If legal advice or other expert assistance is required, the services of a competent professional person should be sought.

- From a Declaration of Principles jointly adopted by a Committee of the Canadian Bar Association and a Committee of Publishers and Associations.

NetA-D25-5