



INVESTOR SUMMIT™ LAS VEGAS



Welcome to your Investor Summit!

We are proud to have you as part of this elite group of real estate investors and look forward to helping you achieve the results you want.

Over the next three days you will meet people who will join your success team and help you grow your business. In the months and years to follow, you will leverage their network, knowledge, skills, and time, empowering you to increase your income and grow your wealth.

We've also searched for, and brought you, different investment options; from properties to pure portfolio income. There is a success option for every investor. We know you will enjoy hearing from our amazing trainers, so settle in and prepare to take your real estate investing to the next level.

PS - We love to hear how you are doing so don't forget to let us know about your successes along the way.



Scott McGillivray
Founding Partner
Host of HGTV's Income Property

Michael Sarracini
Founding Partner
CEO of Keyspire



INVESTOR

SUMMIT™
LAS VEGAS

Welcome

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



The Keyspire Mission

To Put You in Control of Your
Future by Removing the Mystery
of Real Estate Investing

The Keyspire Objective

To Have Your Passive Income
Equal Your Lifestyle Expenses

Lifestyle Freedom Day

Vision for the Keyspire Investor Summit

Welcome to the 41st Keyspire Investor Summit! My vision is for you to gain a unique and refreshing clarity on your bigger future. I want you to believe that your future can and will be bigger than your past.

I want to show you that you already have all the unique raw materials for success inside of you right now. That you can create unique value that others will not only appreciate, but that they will require to be successful themselves.

I want to shift your perspective from competition and scarcity to abundance and collaboration so that you can build meaningful friendships, profitable partnerships and impactful businesses.

I want you to understand your unique path to lifestyle freedom, how to find your way, and how to be self-sufficient to alter your course when needed.

I want to put you in control of your future.

I'll be your partner in unlocking your unique value and making progress to your bigger future. I'm in your corner, and along with this world-class Keyspire team, will be rooting for you every step of the way.

Your bigger future starts today, let's do this!

Michael Sarracini





Our Intentions

- Educate you on your investing options
- Introduce you to the service provider network
- Provide investments on-site
- Give you the confidence to take action
- Add value to you
- Keep you motivated, engaged and moving toward your *Lifestyle Freedom Day*



Summit Ground Rules

1. Keep an open mind.
2. Be present in the moment.
3. Be intentional about where you invest your attention.
4. Focus on progress, not perfection.
5. Believe that your future is bigger than your past.
6. Have fun!

Plan Your Weekend

Event Guide



More Than Just the Main Stage

We have built The Investor Summit to help you “level-up” your Real Estate Investing career. Over the next three days you will have the opportunity to learn from expert speakers, meet and connect with fellow Keyspire investors, and feel empowered to initiate investments across North America.

We have scheduled breaks that will allow you time to explore the venue, (virtually or in-person - however you are attending) engage with all of our service providers, network with fellow Investor Summit attendees, or connect with the Coaching Team to “talk shop”. Meeting new people, investors and experts alike, is going to expand your network and help you grow your portfolio, so don't be shy!

The **Marketplaces** will operate between 8:00am and 5:00pm PST (3pm Sunday) to allow you sufficient time to connect, build your team, explore the resources from the Service Providers and set meetings.

The Virtual Venue is open 24 hours to allow you time to check out all of the incredible features. Be sure to join in on the fun with the Scavenger Hunt, the Social Media Wall, and explore every nook and cranny of this meta-space.

And last but certainly not least, don't forget about your **Investor Summit Portal**, which is loaded with pre-training, and resources to enhance your Summit experience.

Enjoy, and make the most of your Keyspire Investor Summit weekend!

*"Wherever You Are,
Be There 100%"*

- Michael Sarracini



PRESENTATIONS SCHEDULE

FRIDAY

Time	Topic
8:00	Breakfast
9:00	Wendy Russell & Michael Sarracini - Investor Summit Kickoff
10:10	Keyspire Milestone Awards Spotlight: Stefani Mokris
10:30	Break
11:00	Wendy Russell - The Secret to Successful JV Relationships
11:30	Aaron Rook - Market Selection with Referral Network Realty
12:00	Lunch
1:00	Nate Harris - Investing with Self-Directed 401k & IRA Accounts
2:00	Break
2:30	Sasha Cucuz - Equity Partner with Developers: Greybrook
3:30	Break
4:00	Tony Rosenbum - Copper Rock: Using the Banks Money
4:30	Wendy Russell - Friday's Next Steps
4:45	End of Presentations

SATURDAY

Time	Topic
8:00	Breakfast
9:00	Wendy Russell - Saturday Kickoff
9:15	Tony Rosenbum - The 1, 2, 3 and Me Method of Flipping to Hold
10:00	Break
10:20	Mark Perez - Managing Contractors and Making Profits
11:20	Break
11:40	Tony Rosenbum - Mastery Fix & Flip, The Flyout Details
12:25	Lunch
1:40	Chad Chinqy - How I did a Million Dollar Flip without ANY of my own Money.
2:40	Break
3:00	Scott McGillivray - Today's Real Estate
4:00	Break
4:20	Q&A with Scott McGillivray
5:00	End of Presentations

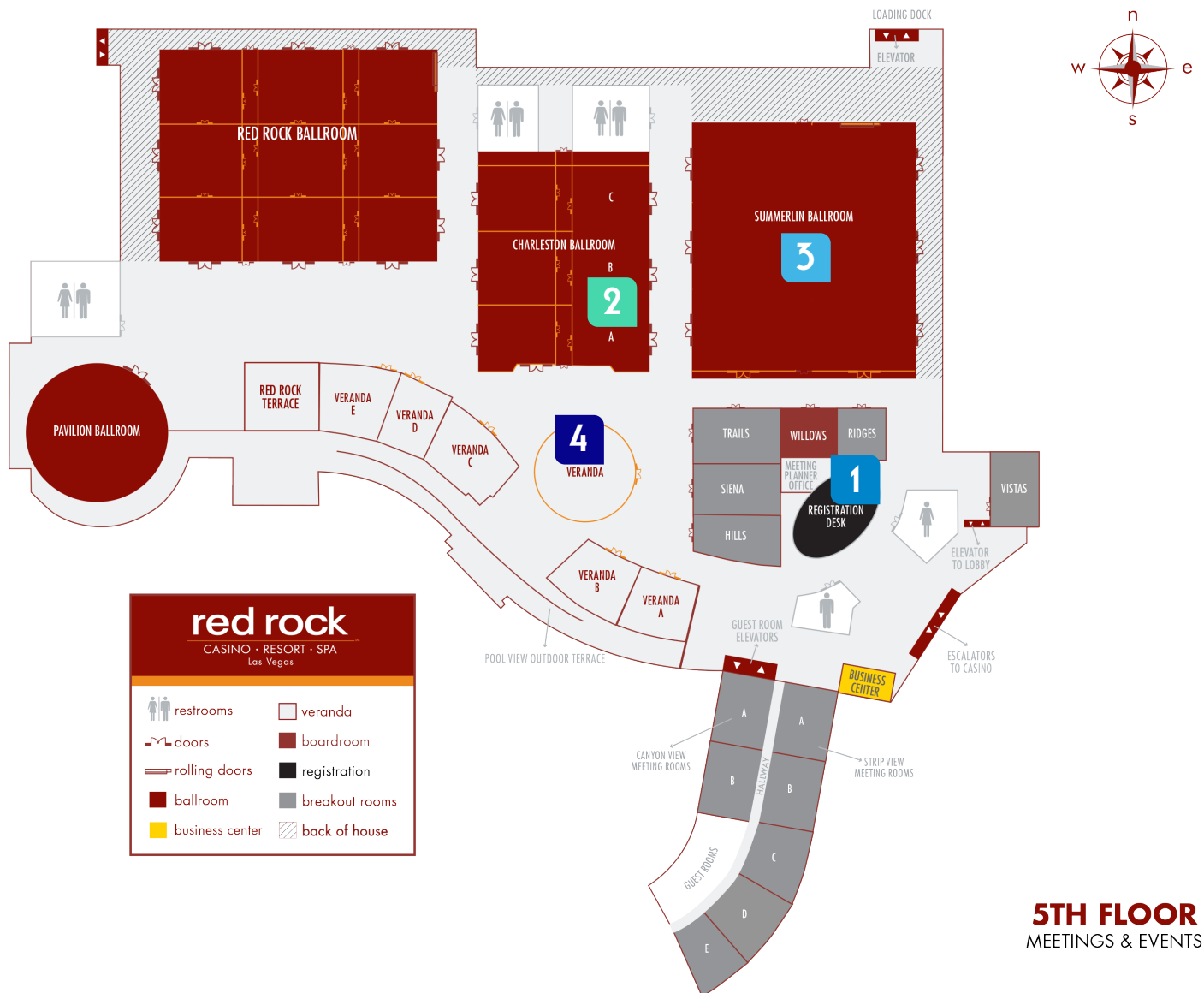
SUNDAY

Time	Topic
8:00	Breakfast
9:00	Wendy Russell - Sunday Summit Kickoff
9:15	Bob Bluhm - Asset Protection
10:45	Break
11:15	Bob Bluhm - Asset Protection pt.2
11:30	Devan Egan- Financial Planning with Tax Hive
12:00	Asset Protection Panel with Bob Bluhm & Devan Egan
12:30	Lunch
1:30	Stephen Libman - Foreclosure Secrets Revealed: Surprising Strategies for Every Investor
2:30	Break
2:50	Keyspire Milestone Awards Spotlight: Jim & Stacey Lawrence
3:10	Real Estate Q&A Expert Panel
3:55	Michael Sarracini - Tying it all Together
4:15	End of Presentations



INVESTOR SUMMIT™ LAS VEGAS

EVENT MAP



1 REGISTRATION - Check in here and let your Summit experience begin.

2 MARKETPLACE - Meet with our exhibitors to build your team or find your next investment opportunity.

3 MAIN STAGE - Sessions run from 9am to 5pm daily.

4 BONUS EVENTS - Thursday: **Summit Social** for Platinum & VIP tickets
- Friday: **Platinum Mixer** (Platinum tickets only)

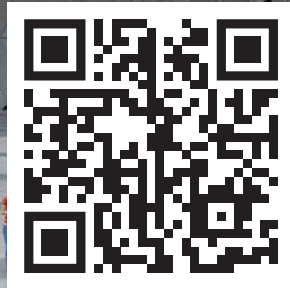
Your Marketplaces

Virtual Keyspire Marketplace

Click on the 'Exhibitor Marketplace' sign in the main lobby of your virtual environment and open the door to investor-focused professionals & investment opportunities from all over the United States and Canada.

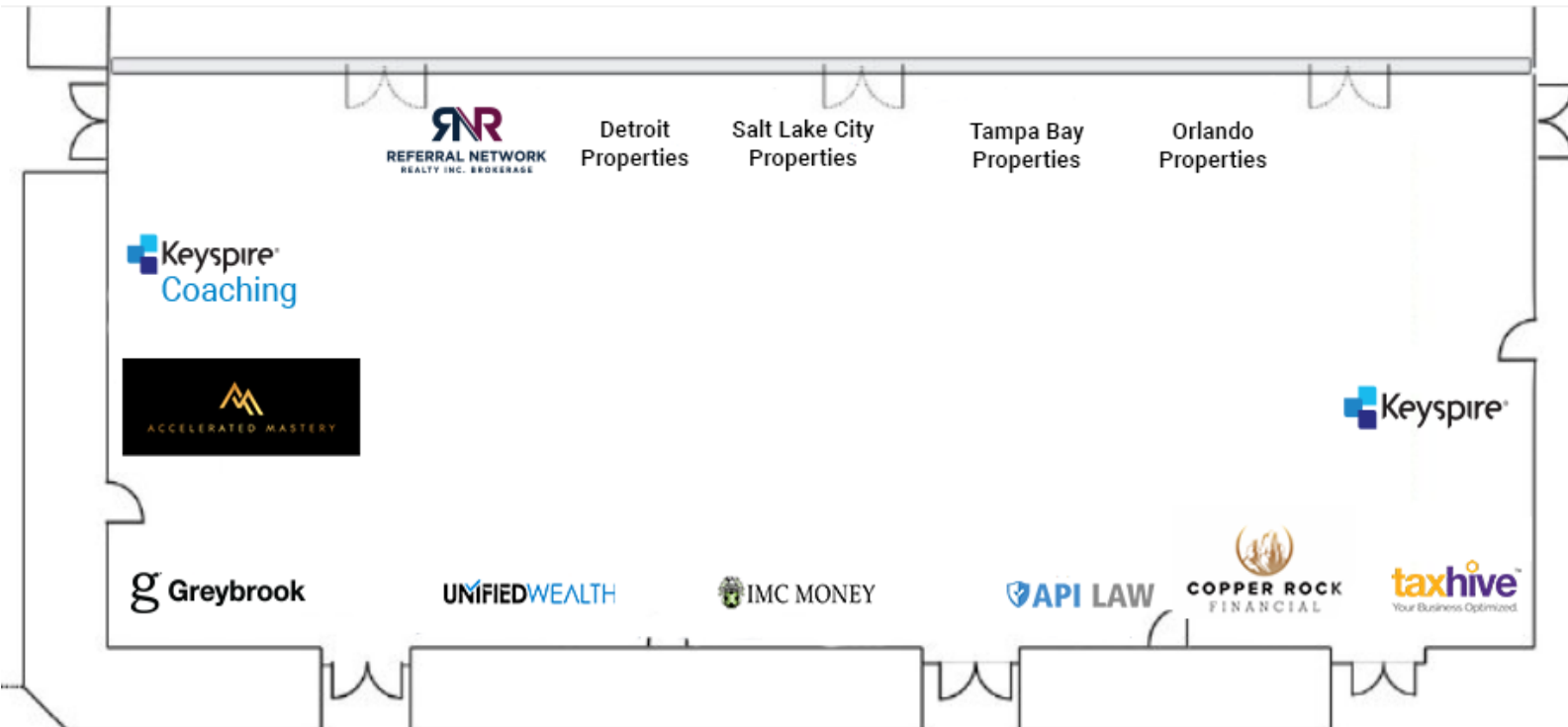


To access the virtual environment, visit <https://investorsummitlasvegas.vfairs.com> or scan the QR code below.



In-Person Marketplace Map

Charlston Ballrooms A,B,C



What is a Realtor Manager?

A Realtor manager is the answer to that common question “How do I find the best Realtor in my market?”.

A Realtor Manager builds a network of qualified expert Realtors in every market, regardless of which real estate company they represent. These experts have all the specialties covered, such as investment real estate, commercial, land, leasing, student rental, residential, recreational, and more.

And the best part... there is no cost to you!

How does it work?

Step 1: Tell your Realtor Manager WHERE you want to buy, sell, or invest in real estate.

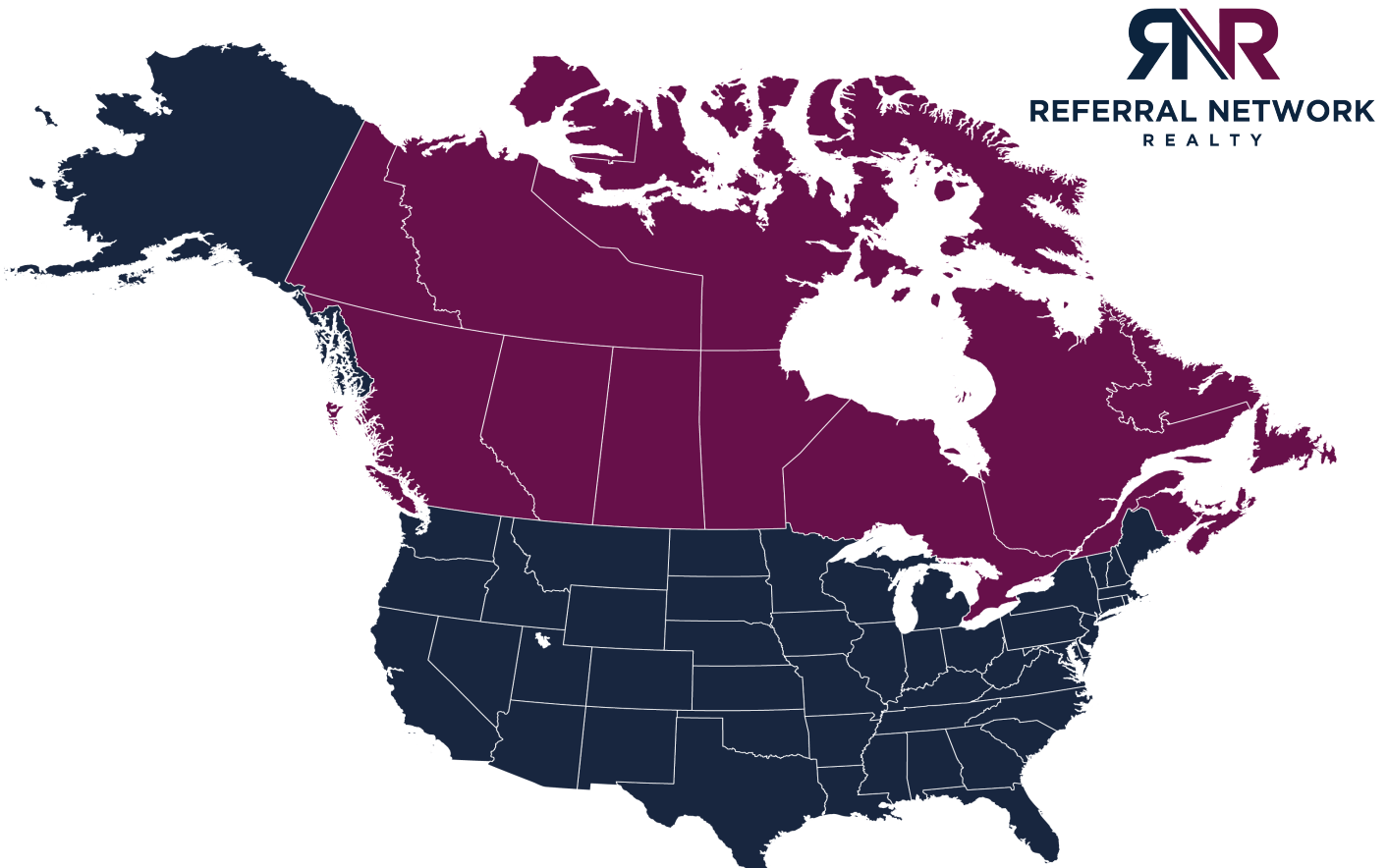
Step 2: Tell them WHAT TYPE of real estate you are interested in.

Step 3: They will CONNECT you with a Top Local Expert. It's that simple!

All of these investment experts understand Keyspire's *4 Ways to Win™* and have extensive experience working with investors just like you.

Connecting Keyspire Members to the Top Real Estate Agents Everywhere!

Keyspire works with Referral Network Realty to connect you with Realtors throughout the United States and Canada.



Service Providers Directory

Meet One-on-One with Investor-Focused Professionals

Financing

Chad Chiniquy

IMC Money

support@imcmoney.com

www.imcmoney.com

Self-Directed IRA

Carter Lane

Unified Wealth

support@unifiedwealthsystems.com

www.unifiedwealthsystems.com

Private Equity Investments

Barry McCullough

Greybrook Realty Partners

keyspire@greybrook.com

www.greybrook.com

Entity Setup & Taxes

Shawn Finnegan

Tax Hive

shawn@taxhive.com

Taxhive.com/keyspire

Short-Term Lending

Matt Slagowski

Lighthouse Financial

info@thelighthousefinancial.com

www.thelighthousefinancial.com

Legal

Bob Bluhm

API Law

bob@assetdefenseteam.com

www.assetdefenseteam.com

Raising Business Capital

Bo Winder

Copper Rock

bo@copperrockfinancial.com

www.copperrockfinancial.com

Fly-Out Training & Coaching

Tony Rosenbum

Accelerated Mastery

tony@taxlienwealthbuilders.com

Realtor Manager

Aaron Rook & Mike Seal

Referral Network Realty

keyspire@referralnetworkrealty.com

www.referralnetworkrealty.com

Salt Lake City Properties

Logan Moffett

RE/Max Associates

The Moffett Group

loganmoffettre@gmail.com

www.moffettre.com

Detroit Properties

Matthew Bush

RE/Max One

Mi First House

matthewjbush11@gmail.com

www.mifirsthouse.com

Tampa Bay Properties

Kristiin Sabey

Dalton Wade Inc

kristiin.sabey@gmail.com

www.benchmark-utah.com

Orlando Properties

Dawood Bedrosian

eXp

The Best Florida Homes

dawoodinc@gmail.com

www.thebestfloridahomes.com



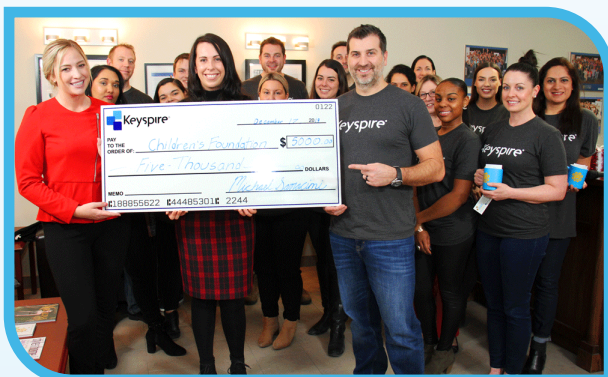
The Children's Foundation is on a mission to empower children and youth by connecting families with opportunities to build hope for lifelong change and break the cycle of poverty.

At Keyspire we share their vision of a community where every child and youth has the equal opportunity to participate, learn, and grow to reach their full potential.



Habitat works together with families, local communities, volunteers and partners from around the world so that more people are able to live in affordable and safe homes.

Their advocacy efforts focus on policy reform to remove systemic barriers preventing low-income and historically underserved families from accessing adequate, affordable shelter.



DAY ONE

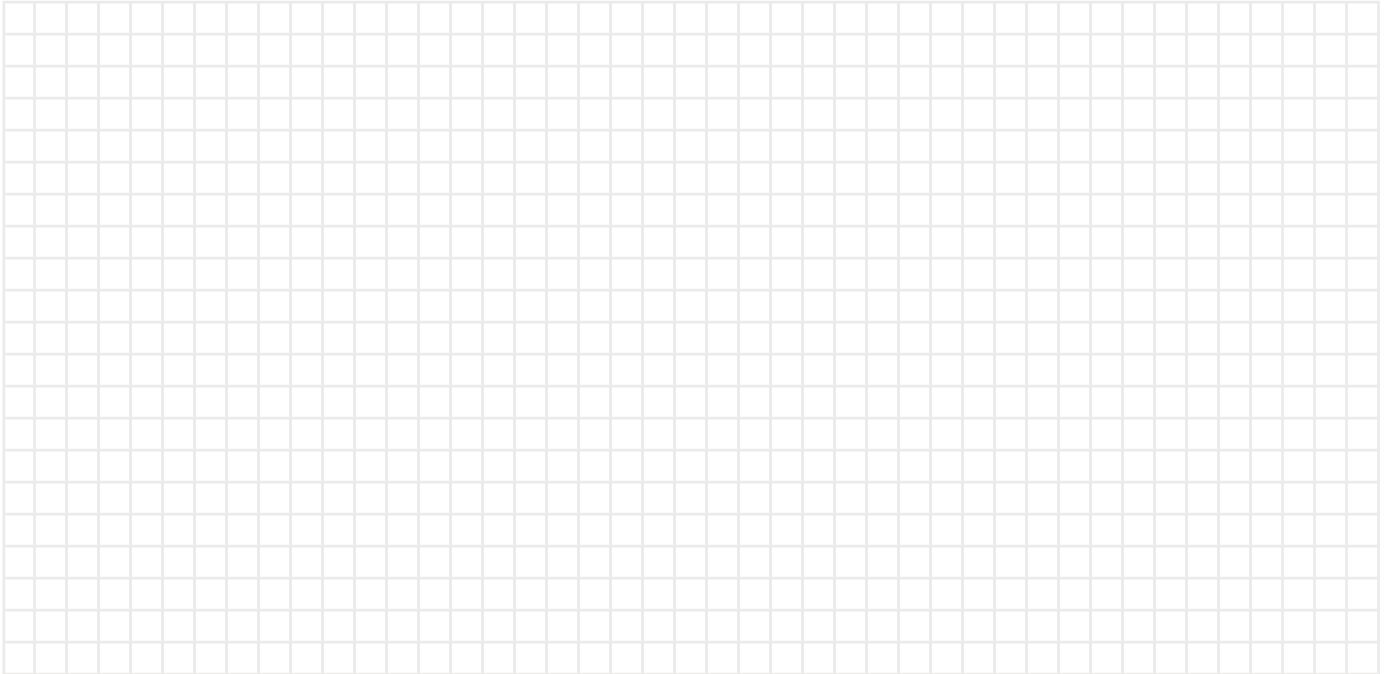
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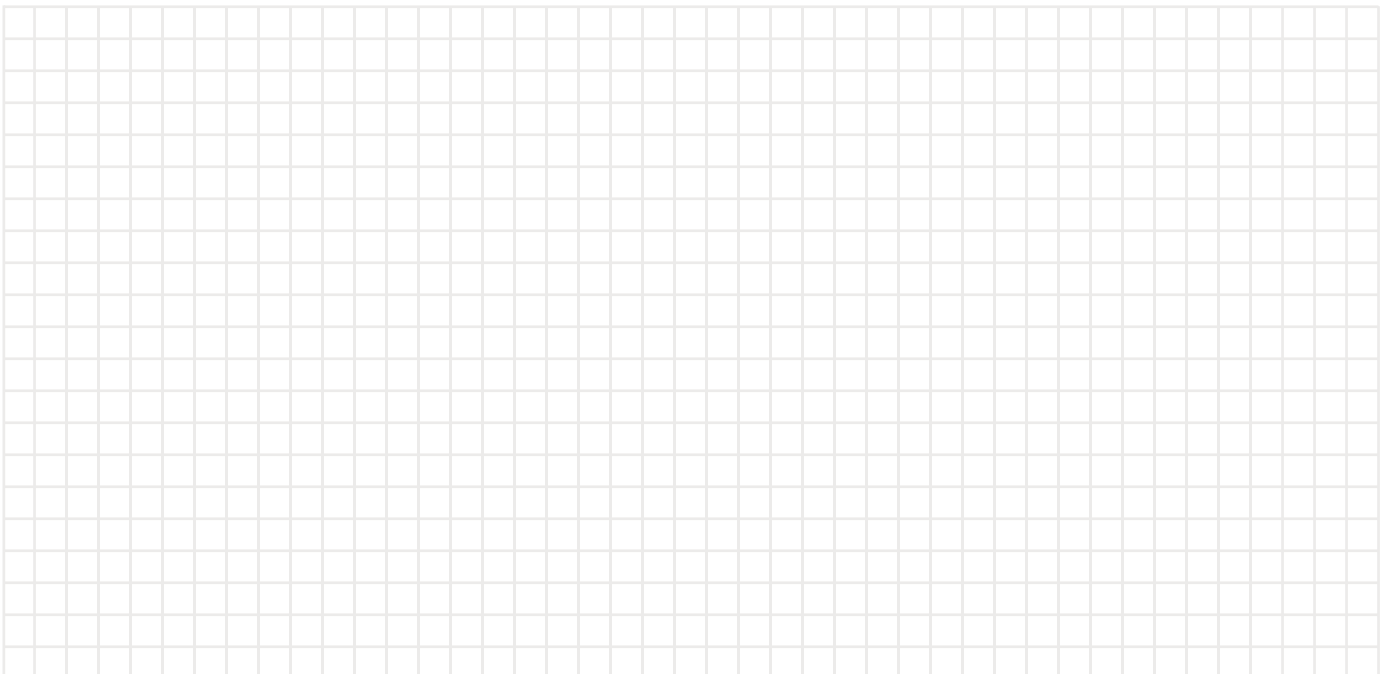
Insights	Actions
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.

Top 3 Next Steps
1.
2.
3.

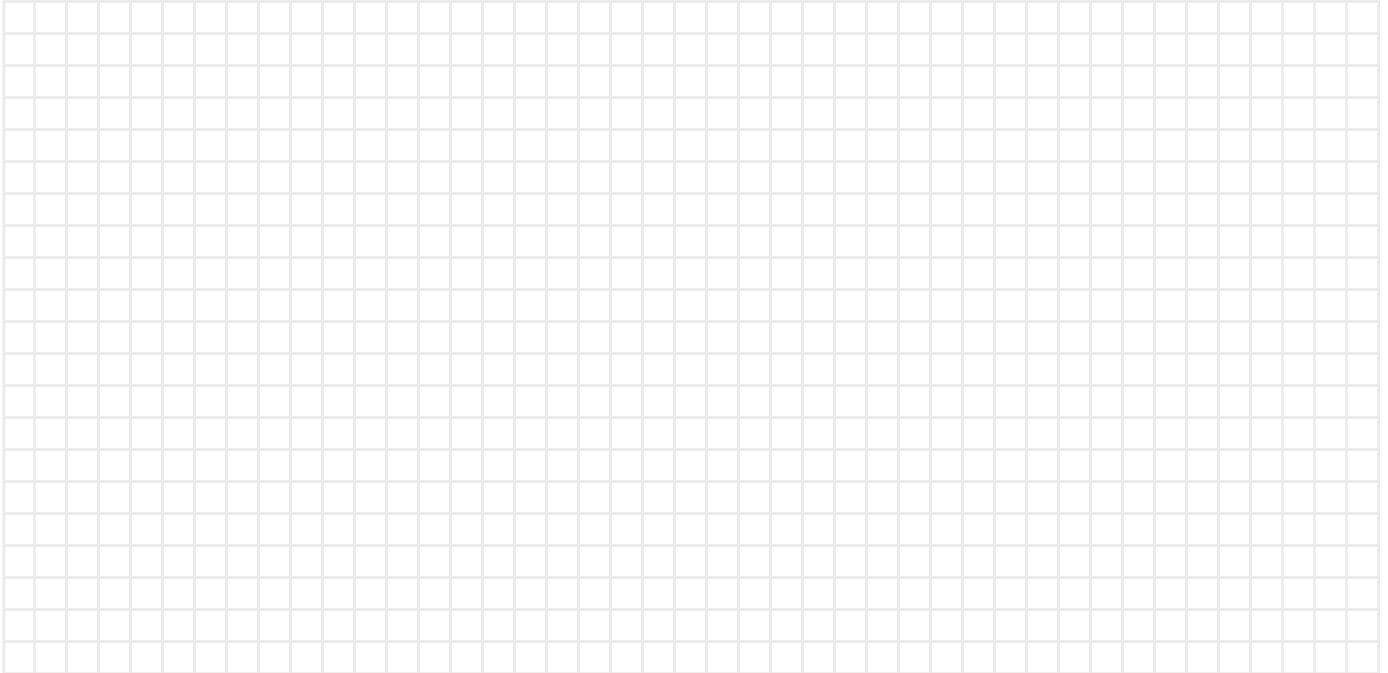
What are your intentions?



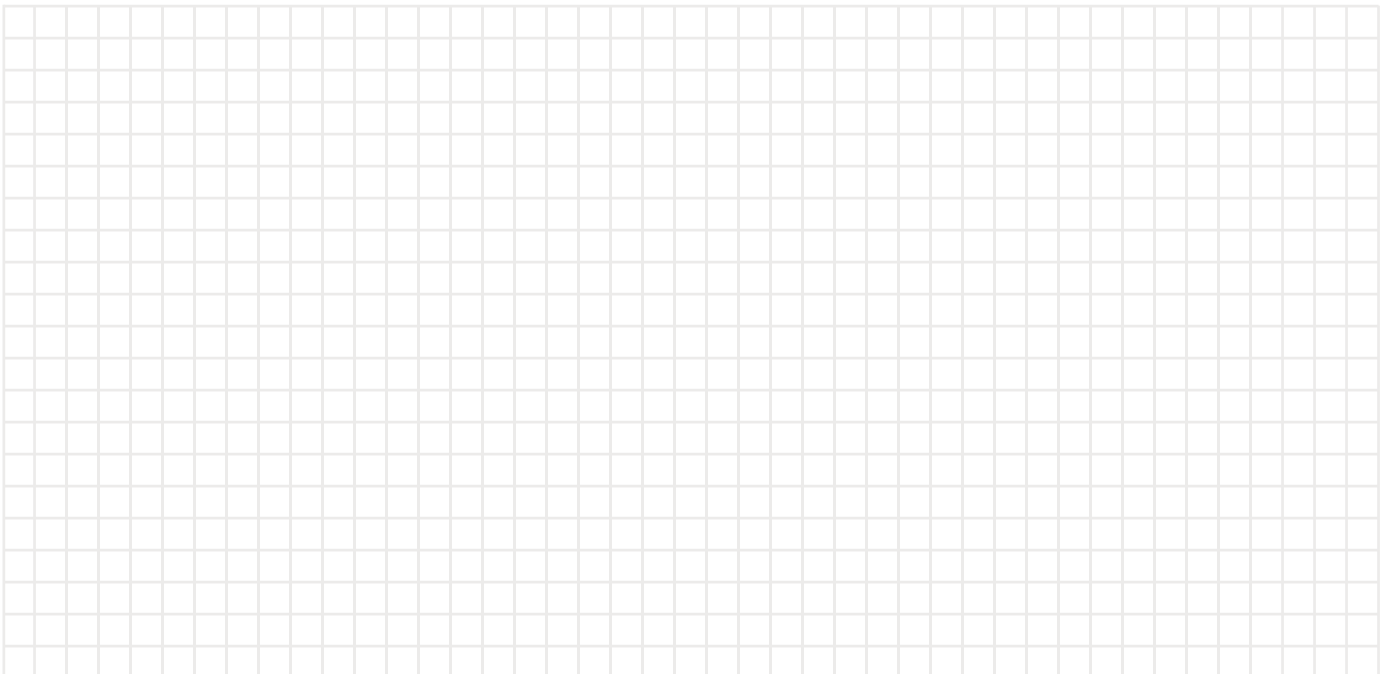
What are your ideal outcomes?



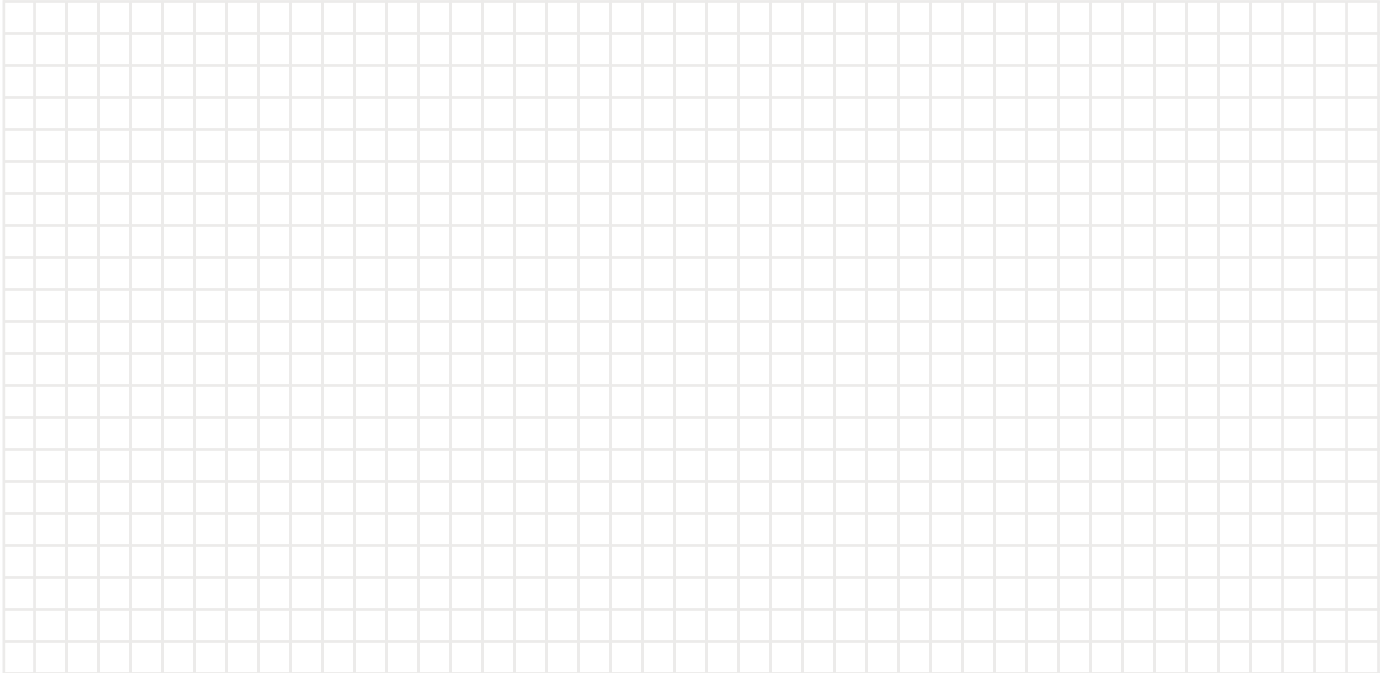
Wendy Russell - The Secret to Successful JV Relationships



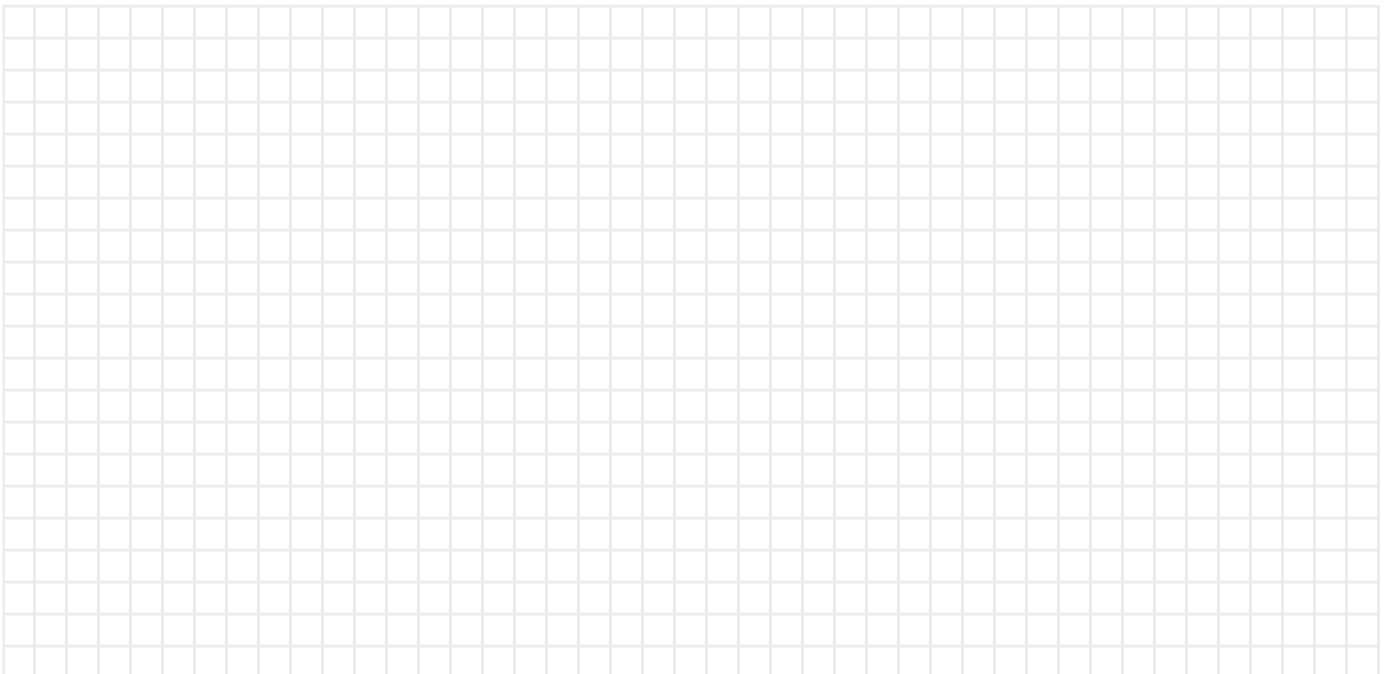
Market Selection with Referral Network Realty



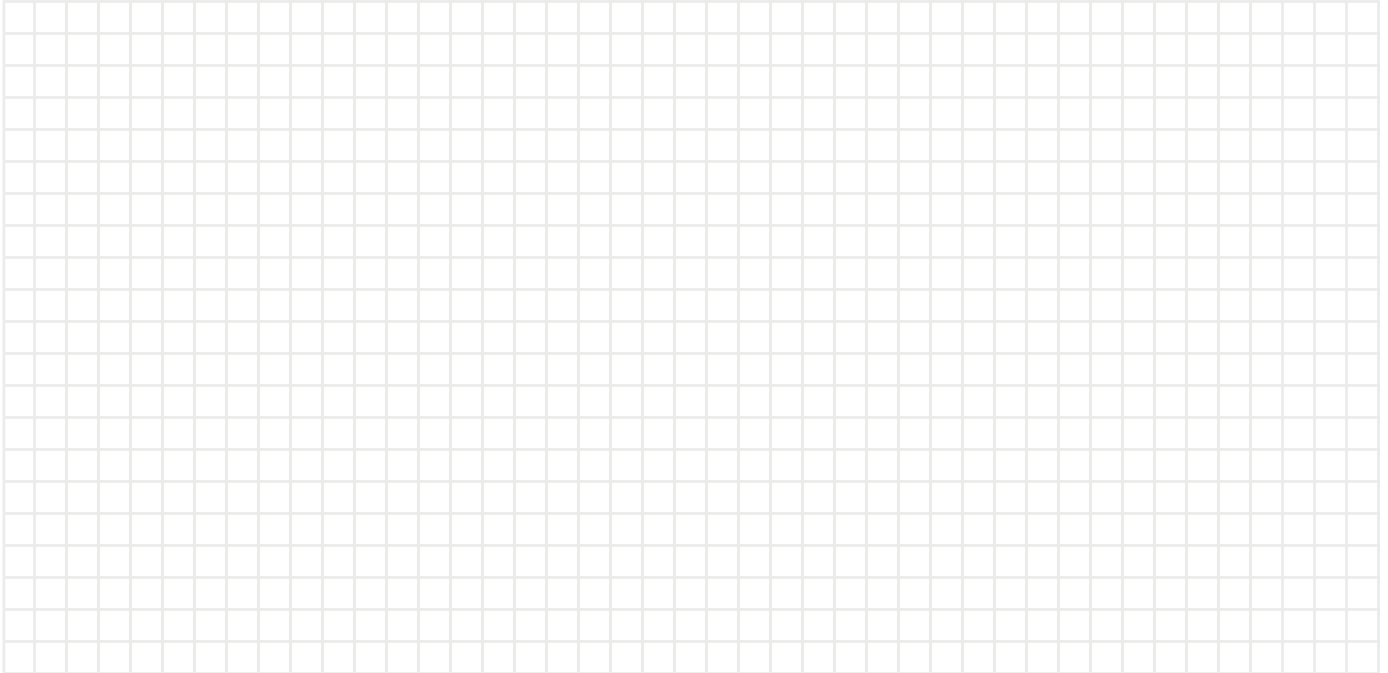
Nate Harris - Investing with Self-Directed 401k & IRA Accounts



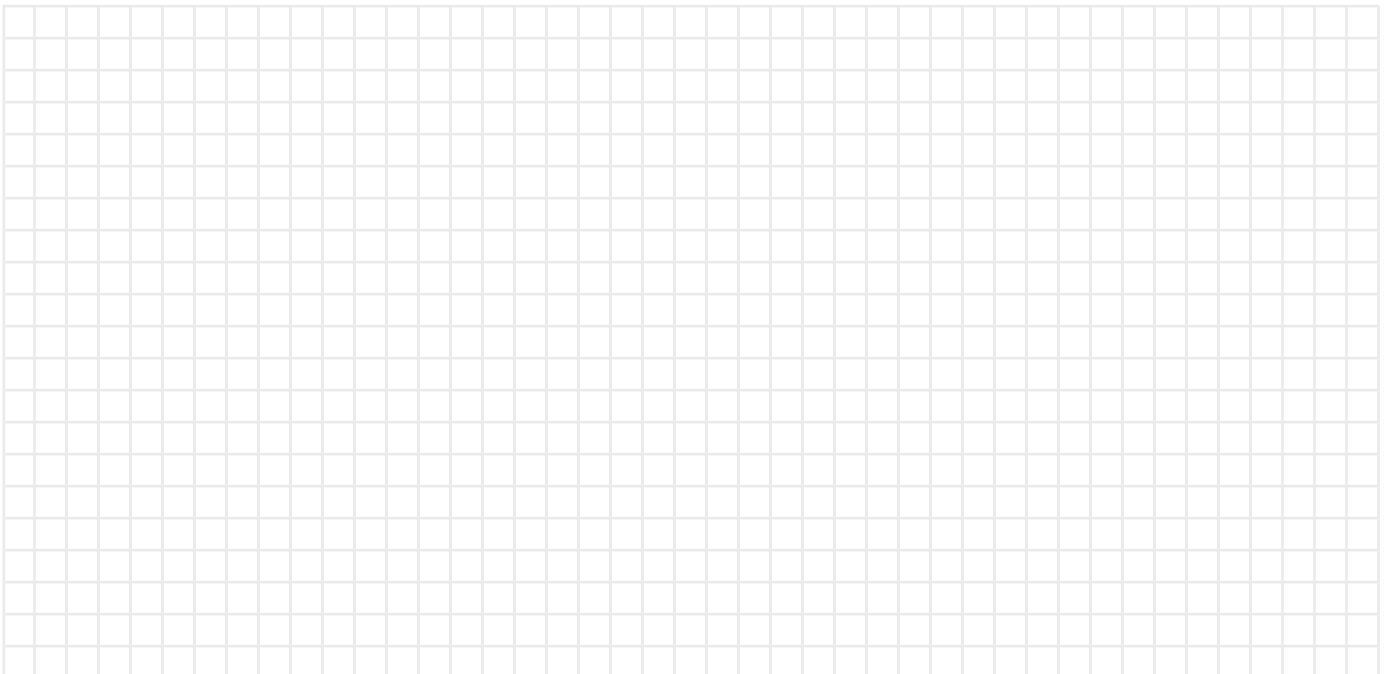
Sasha Cucuz - Equity Partner with Developers: Greybrook



Tony Rosenbum - Copper Rock: Using the Banks Money



Wendy Russell - Friday's Next Steps

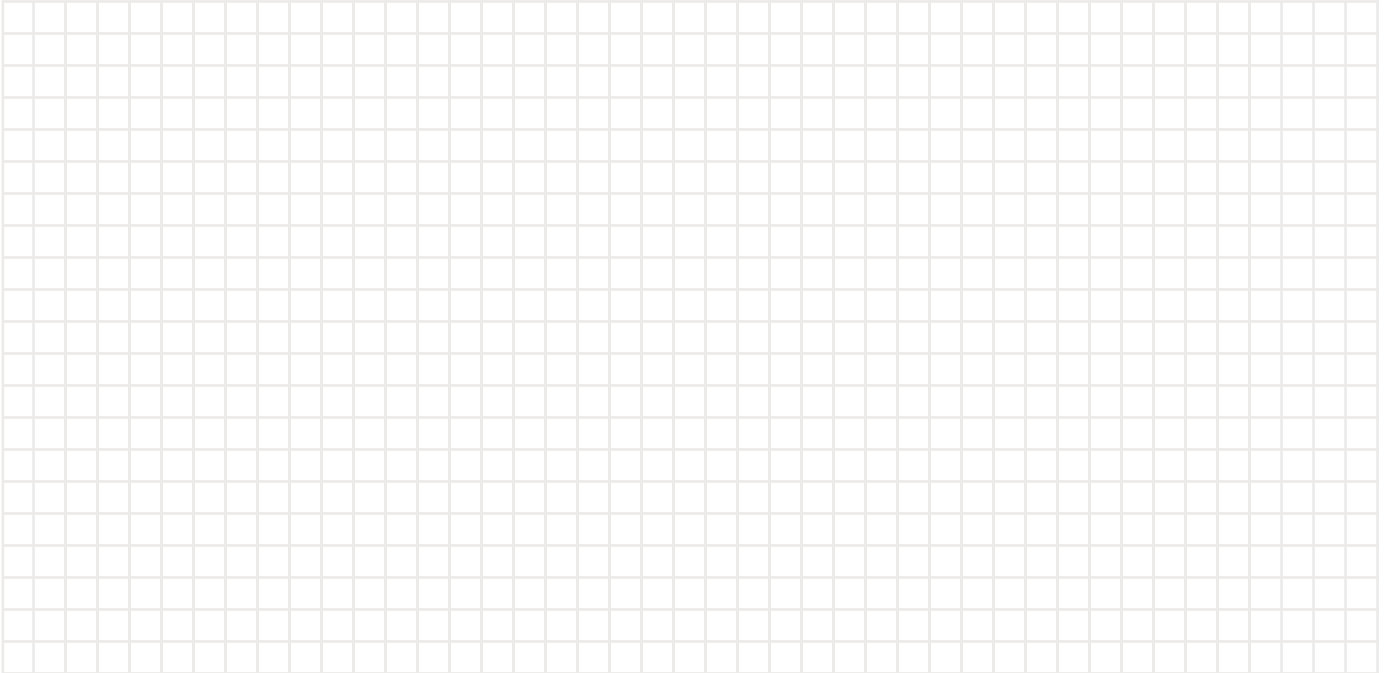


DAY TWO

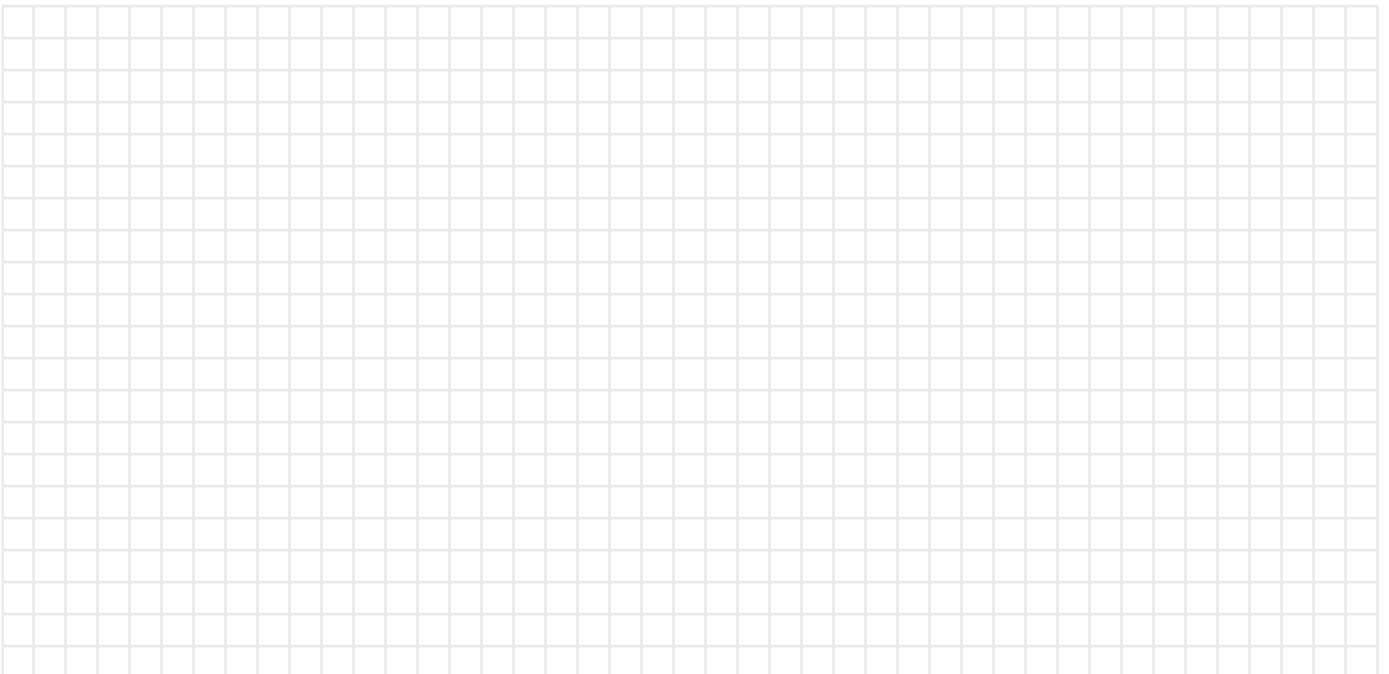
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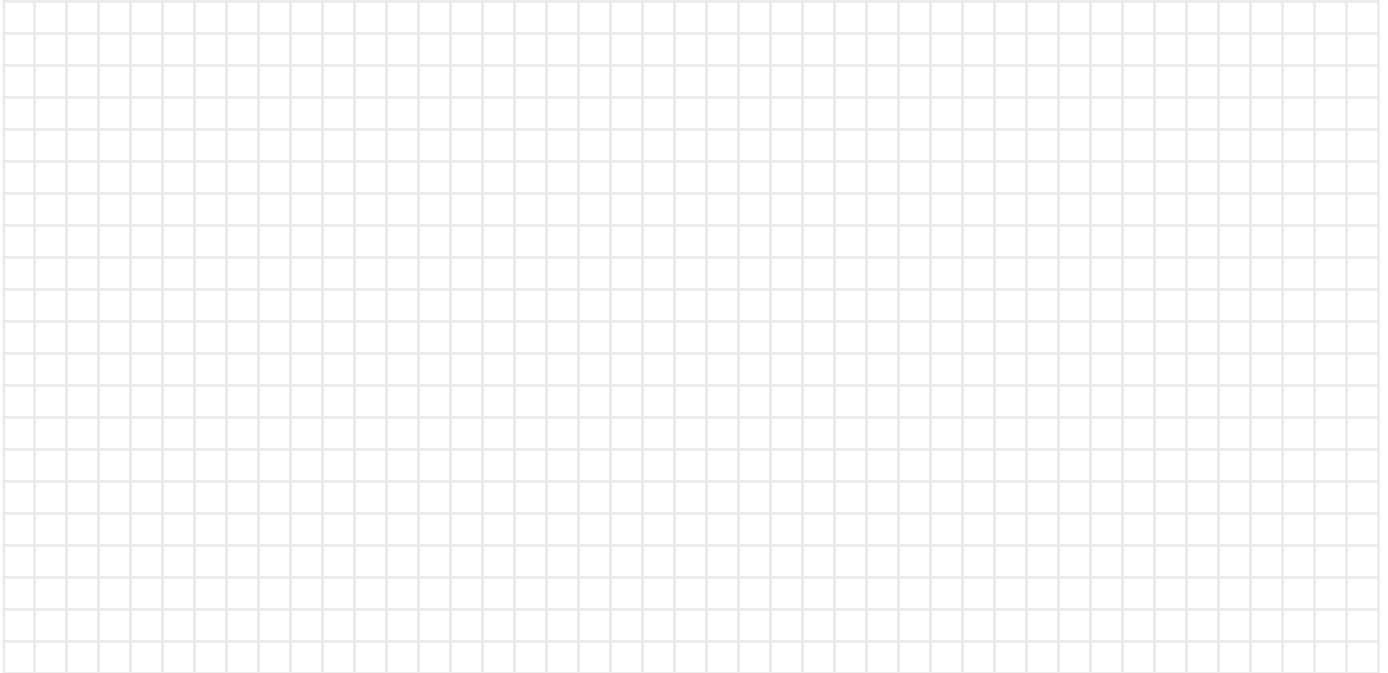
Wendy Russell



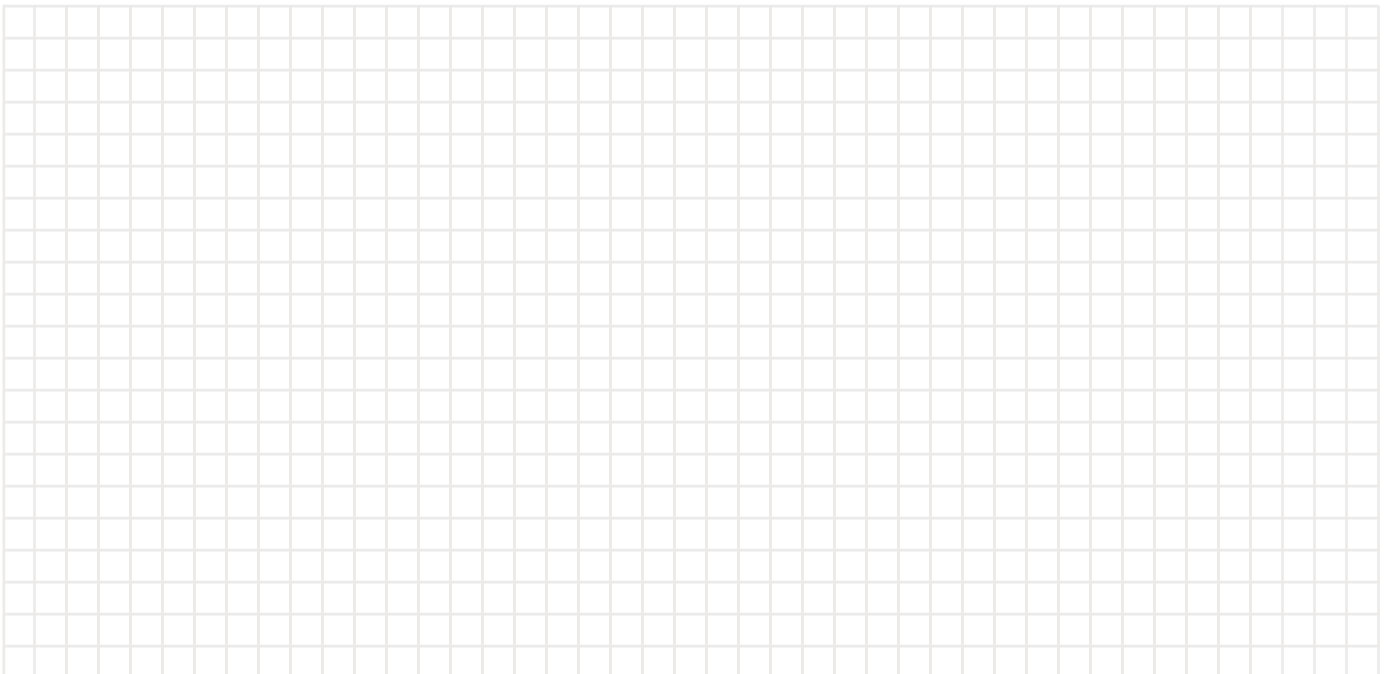
Tony Rosenbum - The 1, 2, 3 and Me Method of Flipping to Hold



Mark Perez - Managing Contractors and Making Profits



Tony Rosenbum - Mastery Fix & Flip, The Flyout Details



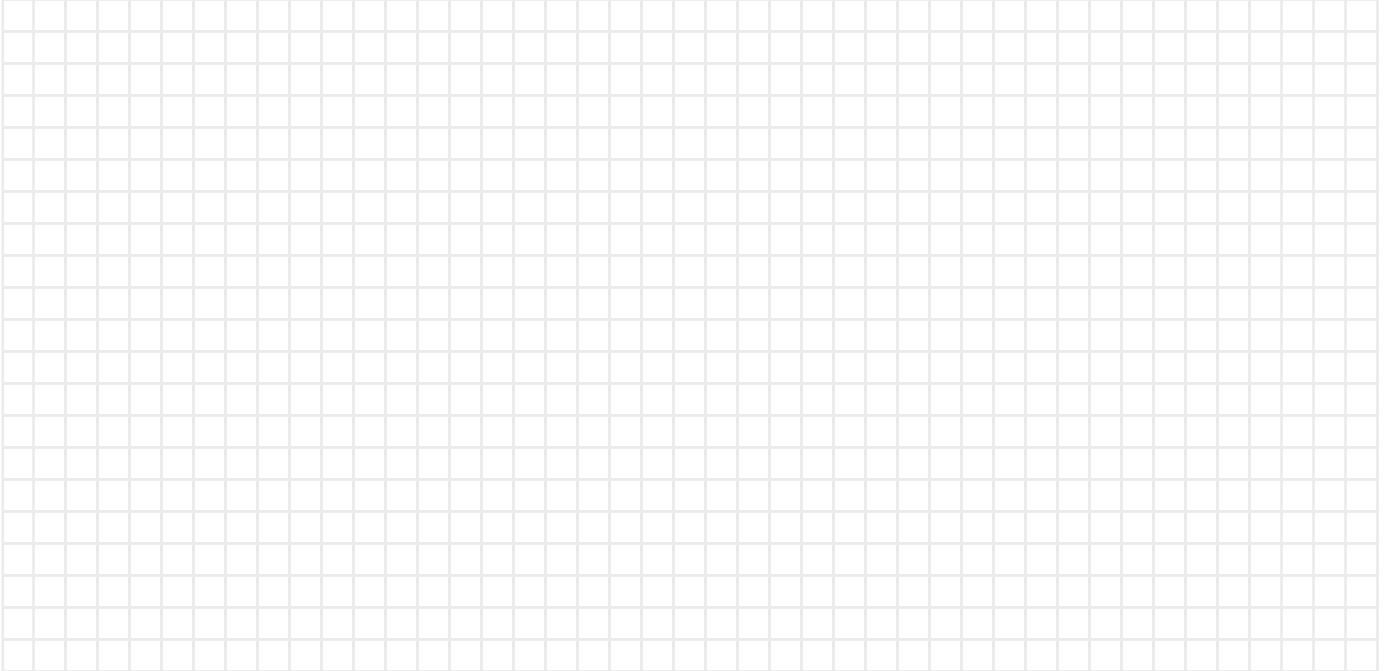
DAY THREE



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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?

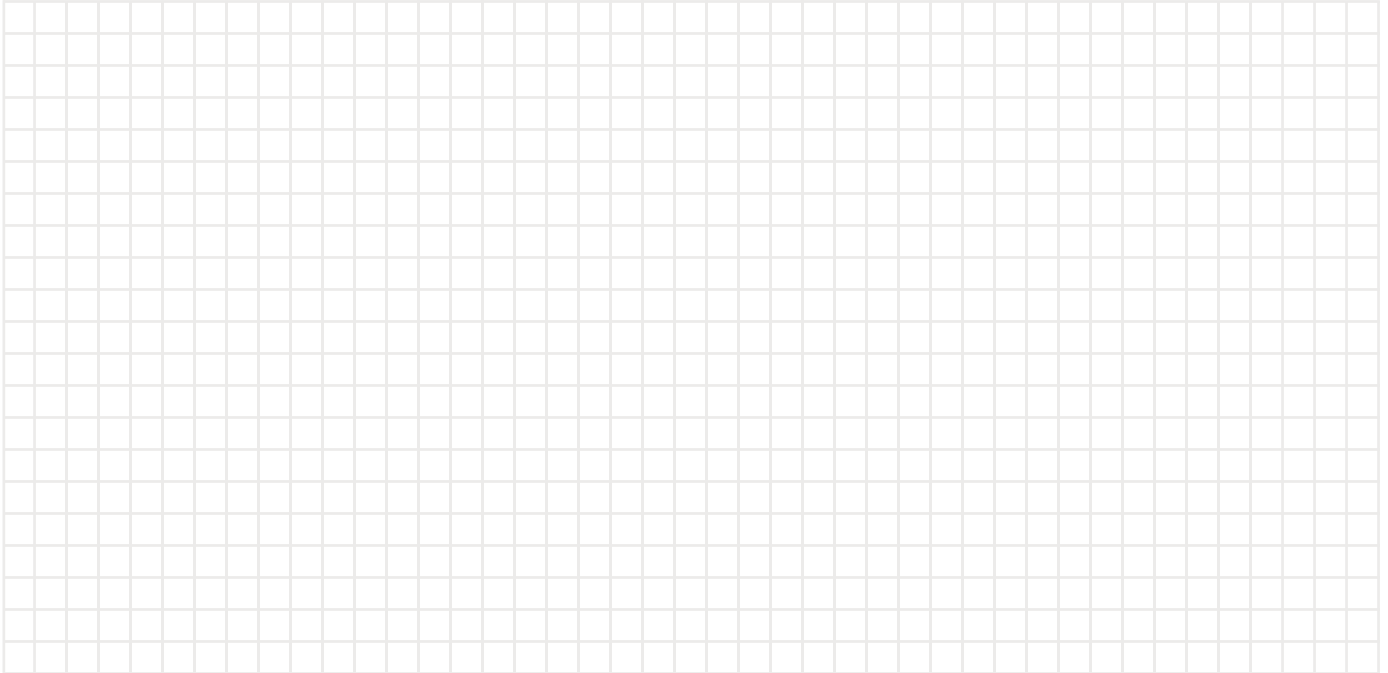
Wendy Russell



Bob Bluhm - Asset Protection



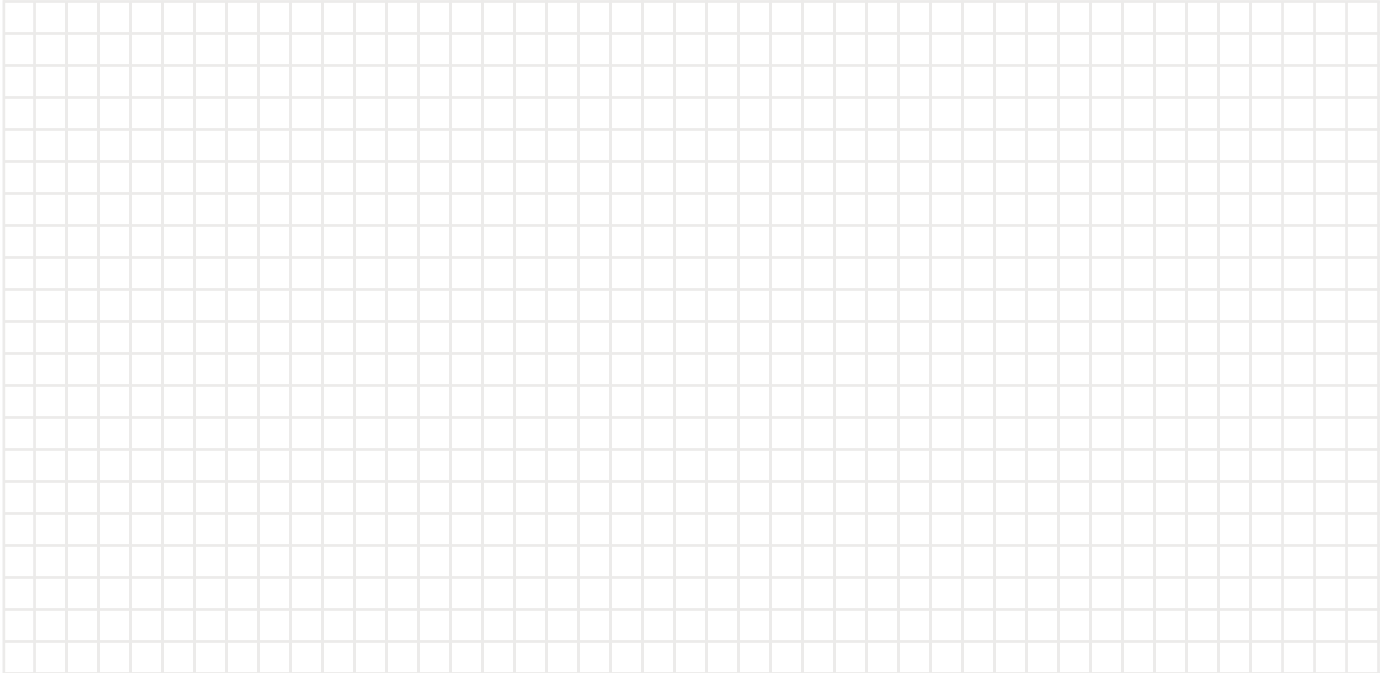
Bob Bluhm - Asset Protection pt.2



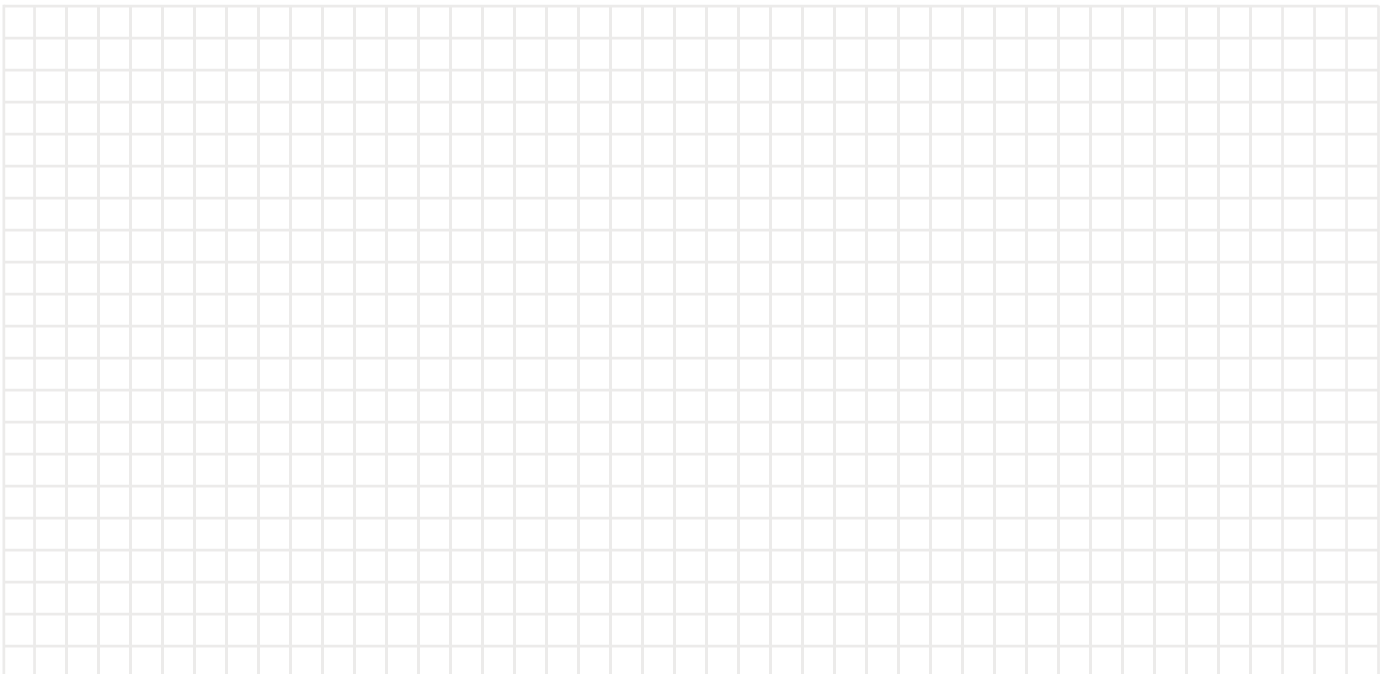
Devan Egan- Financial Planning with Tax Hive



Asset Protection Panel with Bob Bluhm & Devan Egan



Stephen Libman - Foreclosure Secrets Revealed: Surprising Strategies for Every Investor



Key Learnings

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Key Learnings

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Key Learnings

A large rectangular area filled with a light gray grid pattern, resembling graph paper. The grid consists of small squares and is intended for users to write down key learnings or take notes during a presentation.

Additional Resources



A joint venture (JV) is a business arrangement in which two or more parties agree to pool their resources for the purpose of accomplishing a specific task, such as purchasing a house. Use this as a guide for conversation with your potential co-venturer.

Example Due Diligence Questions

1. What is your "Why"?
2. Can you describe your investing style and goals?
3. What real estate investing experience do you have? Which transferable skills and experience do you have that you will bring to your real estate investments?
4. What responsibilities are you looking for from me?
5. Which of *The 4 Ways to Win™* are most important to you?
6. Who will hold title?
7. What capital contributions are required from each party? What about cash calls and future renovations?
8. How will the property bank account be managed?
9. How and when will we receive our returns? What is the profit share? 50/50?
10. What is your projected timeline for the investment?
11. What is the exit strategy? Is it clearly defined?

Things to Consider in the Agreement

Definitions - Identify the property and name the parties to the agreement. Define the proportionate interests of each.

Bookkeeping - Make it clear who is responsible for bookkeeping and balancing the books.

Team - You will need the ongoing services of professionals such as a real estate agent, lawyer, and an accountant. Write their names into the agreement and require mutual agreement to retain them.

Disclaimer - Make it clear that this agreement applies to one property only and is not a partnership or joint venture for any other purpose.

Management - Decide whether both parties have to consent to do repairs, agree on a tenant, or any other day-to-day issue.

Cash Calls - A joint venture may run into the red for many reasons - including vacancy, repairs, renovations, or a jump in the costs of regular expenses. How will a shortfall be accounted for?

Refinancing or Sale - When a property comes up for refinancing or sale, how will profits be allocated between partners?

Termination and Exit Strategies - If one party wants to exit the joint venture, can either party trigger the sale of the property on the open market? Can one party force the other party to buy or sell their half-interest? What happens if the desire is present but the money isn't?

Unforeseen Events - It's always hard to plan for death, serious-but-short-term illness, long-term disability or even a job transfer out of the city. Consider the possibility of life, disability, or mortgage insurance to protect against the unforeseen.

What Requires a Building Permit?

Not Required

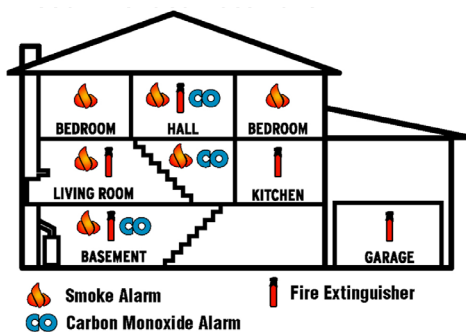
- Replacing doors and door hardware
- Replacing flooring
- Painting
- Replacing light fixtures
- Replacing plumbing fixtures
- Cabinetry

Required

- Finishing any space
- Adding another unit
- Removing walls
- Moving plumbing
- Moving electrical

Always check with local building department when assessing the need for a building permit

Fire Safety Recommended Locations



Contractor Sourcing Checklist

- ☐ Local bandit signs
- ☐ Online search
- ☐ Neighborhood work
- ☐ Referral/word of mouth
- ☐ Keyspire Inner Circle & IPL Facebook Group
- ☐ Designer procurement

Rehab ROI Checklist

- ☐ Flooring and paint
- ☐ Door hardware
- ☐ Light fixtures, switches, and receptacles
- ☐ Doors and trim
- ☐ Add bedrooms
- ☐ Layout improvements
- ☐ Front exterior landscaping
- ☐ Kitchen
- ☐ Bathroom
- ☐ Add an additional unit

Rehab Money Saving Checklist

- ☐ Habitat kitchen program
- ☐ Habitat Re-Store as source of materials
- ☐ Post demolition materials online for free
- ☐ Other people's money
- ☐ Seasonal deals
- ☐ Government rebate programs
- ☐ Groupon
- ☐ Carpet cleaning
- ☐ Junk removal
- ☐ Painting
- ☐ Handyman services

Rehab Safety Checklist

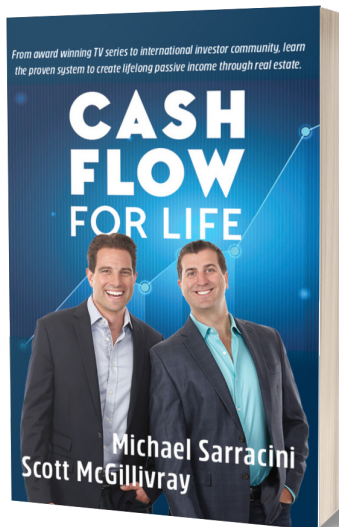
- ☐ Interconnected smoke detectors
- ☐ Fire extinguishers on every level
- ☐ CO detectors on every level
- ☐ Furnace relay shutoff
- ☐ Strobe smoke detector
- ☐ Egress windows per city/county/state/province code
- ☐ HVAC ductwork smoke sensor
- ☐ Fire escape floor plan
- ☐ Fire system battery change log sheet

Adding Value Checklist

- ☐ Your customers (tenants)
- ☐ Your business partners
- ☐ Your service providers
- ☐ Local media outlets
- ☐ Strangers
- ☐ The community
- ☐ Fundraising events
- ☐ City hall committees and subcommittees
- ☐ Donate your time and expertise
- ☐ Start a support group
- ☐ Leverage you network for good
- ☐ Become a local celebrity

Best Books on Real Estate Investing: Expand Your Knowledge with Keyspire

Are You Ready to Become a Serious Investor?



Cash Flow for Life is your guide to real estate investing success. Michael and Scott have the answers to create consistent positive cash flow through income property investing.

This book is your guide successful real estate investing for the long term.

Cash Flow for Life and *Quick Start to Cash Flow* work together to put you on the right track to creating lifestyle freedom.

Know your options and maintain a consistent cash flow!

Need More Capital Before You Invest?



Quick Start to Cash Flow is for individuals who want to begin purchasing investment properties but don't have the cash to get started.

Michael and Scott teach you the options available to begin building capital in order to start purchasing the long-term real estate investments you want.

Cash Flow for Life and *Quick Start to Cash Flow* work together to put you on the right track to creating lifestyle freedom.

Know your options and create capital to get started!

Available in Paperback, Audible audiobook, and Kindle eBook formats at **keyspire.com/books**



#keyspireinvestorsummit

SHARE YOUR INVESTOR SUMMIT ADVENTURE





Thank you for attending the **Investor Summit**, we hope you enjoyed the time you spent with us over the weekend. You should be proud knowing you have walked away with more knowledge (and maybe a new investment or two!)

Please be sure you refer to this Workbook, the notes you took, the information and the contacts you made, and put a plan in place to take action!

As always, the Keyspire family is here to support you. If you have any questions or you are looking for more support with Coaching or Education, please contact our wonderful Member Services Team at members@keyspire.com.

Remember to post all of the photos from your Summit experience to your Facebook and Instagram accounts, using the hashtag **#keyspireinvestorsummit** !

We can't wait to go through and see each and every single one of them.

We can't wait to see what you get up to next in your Real Estate Investing Career!

Sincerely,

Michael, Scott, & The Keyspire Team



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

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