

Onboarding Checklist

Welcome to Keyspire Coaching!

We're thrilled to have you as part of the community. This checklist is designed to give you a quick snapshot of the key steps to get started without feeling overwhelmed. You'll also receive important email notifications throughout your journey to keep you on track — but use this as your easy reference guide.

☐ Coaching Profile

Complete your [Coaching Profile](#) so your coach understands your goals, experience, and priorities. This allows us to personalize your coaching journey from the very start.

☐ Keyspire Connect

Log into [Keyspire Connect](#), your main portal. Inside you'll find:

- Coaching resources
- On-demand training courses
- Tools & templates to support your investing
- Access to the Keyspire community

☐ Coaching Sessions

You'll be matched with your coach who will guide you step by step. Schedule your sessions regularly to stay accountable and on track toward your goals.

☐ Community & Facebook Groups

Join our private Facebook groups to connect with other investors, share wins, and ask questions:

- [Keyspire Inner Circle](#)
- [Keyspire Membership](#)

(Links will be provided — make sure to join and engage!)

☐ Investor Summit

You have 2 tickets to the Investor Summit — you're already registered!

Save the dates: June 12–14, 2026
Fallsview Casino & Resort, Niagara Falls, ON

If you haven't already done so, please confirm the name and email address of your guest with your Client Success Specialist so we can finalize registration.

With these steps complete, you'll be fully set up to maximize your coaching experience. Welcome aboard — we're excited to see your success!