



# PLATINUM ACCELERATOR



SUMMARY  
NOTES



# PLATINUM ACCELERATOR

Hi Guys,

The purpose of this Summary Notes Folder is to kick-start you getting organised – because being organised is a key to success. This folder is designed to be a central location for you to store all the notes and resources that you compile throughout this program. It should become a single reference point, summarising where you are at, what you are working on, and your learnings along the way. Please don't just put it on your bookshelf and forget about it though... it will be of no use to you there!

It is expected that you will bring this folder to each of the Monthly Mastermind Events – as there will be information in it that you will need to refer to.

To make this as user friendly as possible, and to guide you on what you should be putting into this folder, tabs have been created to flag the purpose of each section. Detailed below is a brief description of each tab and what notes/resources you should put in there.

## **Tab 1 – Contract Checklist:**

This tab includes a blank Contract Checklist. This contract is a commitment that you are making to yourself and your coach to undertake all aspects of the Success Accelerator Mastermind Program. It is a checklist for you to complete, sign, date and email a copy to your coach.

Commit to it and keep yourself accountable as you progress through the program!

## **Tab 2 –Property Blueprint Road-map Consultation Notes:**

This tab flags the section where you are to insert the notes you have taken from your Property Blueprint Road-map Consultation with your coach. On receiving your Property Blueprint Consultation audio recording, you should review it in detail, make notes of the actions discussed and then start putting it into action.

## **Tab 3 – My 7 Day Goals:**

This program is all about accountability – being accountable to yourself and to your coach. To assist you in this process, there is a blank 7 Day Goals form included in this tab. The intention is that you will complete a 7 Day Goals form every week of the program. Therefore, photocopy this form, or print copies from the template file on the member's only website.

As discussed in Module 2, these goals do not need to be limited to your property goals – they should be holistic and include everything in your life that you want to be held accountable to. So in addition to your property goals, include your health, fitness and relationship goals, as you see fit. A good idea is to complete the 7 Day Goals form on a Sunday or Monday morning, in order to set yourself up for the week ahead. Then revisit the form each week, and for those items that you didn't complete, add them to your next week's goals. But don't forget to put an asterisk next to them, so that you know they were incomplete from the previous week... and should be done first up this coming week. A great idea is to assign a day of the week to each goal, and even a time of the day. That way you have a plan of what you are going to do each day of the week. Also, prioritising your goals each day, so you know which ones you need to work on first.

Store each of your 7 Day Goals forms in this tab in your folder. That way you can maintain a record of what you have achieved, and what you are working on.

Email your coach each of your 7 Day Goals forms, so that they can keep you accountable!! If you have any issues with this process, work through Module 2 and follow-up with your coach.

Remember, setting goals and keeping yourself accountable is something you should be doing on-going, not just for the 12 months of this program. So incorporate this simple tool into your weekly routine from here on in... and be amazed at the progress you will make!

#### **Tab 4 – My Monthly Goals**

This tab includes a blank Monthly Goals form. Yes, this is exactly the same as the 7 Day Goals form described above, however, the intention is for you to record your monthly goals here. It is these larger monthly goals that will inform you on what you need to be targeting for your 7 Day Goals. Assign a week of the month to each goal so that you know if it is to be done in week 1 or week 4 of the month.

Store each of your monthly goals forms in this tab in your folder and email a copy to your coach.

To each of the Monthly Mastermind Events, bring your Summary Notes Folder, and therefore your previous months and current month's goal forms. This is important, as these forms will be referenced during the accountability session at the monthly events.

Photocopy this form, or print copies from the template file on the member's only website. Once again, if you have any issues with this monthly goal setting process, work through Module 2 and follow-up with your coach.

#### **Tab 5 – My Market Ready Checklist**

Module 1 covers Getting Market Ready, and to facilitate this process, a checklist has been compiled of all of the major market ready tasks that you need to have reviewed. This checklist is located in this tab. Use this checklist to record and keep yourself accountable around what you still have to complete. These items should also then be reflected in your 7 Day and Monthly Goals forms, so that you have a system for working through them in a timely manner. Your coach will refer back to this checklist to ensure that you are fully market ready.

#### **Tab 6 – My Peg In The Sand:**

Module 2 covers goal setting and in the Appendix of Module 2 is your Peg In The Sand document. Once you have completed this document, remove it from the Appendix and insert it into this tab in this Summary Notes Folder. The purpose of keeping it in this folder is to keep all your working documents in the one location, so that you have one central point to access where you are at and what you are working towards.

#### **Tab 7 – My 2 Year Plan**

Module 12 steps you through the process of completing your 2 Year Plan. Once complete, insert it into this tab for on-going reference.

#### **Tab 8 – Induction Webinar Series Notes**

A series of induction webinars are available on the Members Only Website. These webinars provide a massive kick-start to the 12 month program. It is suggested that you take lots of notes during these webinars and that you relate the information to your own personal situation. Insert these notes into this tab and refer back to them regularly to keep you on track.

### **Tab 9 – Monthly Mastermind Event Notes**

Each of the Monthly Mastermind Events will include an interactive workshop session. This session will profile a different strategy deal, and will systematically step you through the real life processes of completing that deal. To facilitate the learnings, a notes workbook will be issued at each event, and is to be completed during the workshop session. These notes workbooks are to be inserted into this tab, so that as the program progresses, you will compile detailed resource material for your future reference.

### **Tab 10 – UBL Profile**

This tab flags the section where you are to insert your UBL Profile once received back from your coach. Upon receipt, you should review your profile in conjunction with the UBL webinar recording on the members only website. It is essential that you do not review the profile without the webinar recording, because terms used in the profile have specific meaning that are detailed in the webinar. There are also supporting documents referred to in the webinar that will be emailed to you with your profile.

Insert these supporting documents and your webinar notes into this tab for future reference.

So remember... to be successful you need to be organised and accountable, and this Summary Notes folder supports you in that process. Commit to it and you will be amazed at your success.

A handwritten signature in cursive script that reads "Dymphna".

Dymphna





# PLATINUM ACCELERATOR

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## CONTRACT CHECKLIST

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## Platinum Accelerator Contract

I, \_\_\_\_\_, understand that I am undertaking an intensive, guided property education, accountability, and implementation program. I commit myself to the 12 month duration of the program. I commit to completing all accountability and strategy components of the program, attending all events, reading or listening to the audios of the 12 Modules, and completing all associated tasks.

\_\_\_\_\_ (Signature) \_\_\_\_\_ (Date)

### Accountability

- Complete Weekly Task / Goal Sheet (Summary Notes Folder)
- Complete Monthly Task / Goal Sheet & Email Coach (Summary Notes Folder)
- Maintain Regular Contact with Coach & Ask Lots of Questions
- Review Weekly Coaches Email

### Strategy

- Complete UBL Profile & Review Results in Conjunction with the UBL Webinar (website)
- Consultation with Coach – Property Blueprint Road-map
- Review Audio Recording and Make Notes from Property Blueprint Road-map Consultation
- Complete Getting Market Ready Checklist (Summary Notes Folder)
- Review Induction Webinars Series (website)

### Events

- Attend Monthly Mastermind Evening Events
- Attend all three National Conferences

### Module Tasks

- Listen To Welcome Recordings (Dymphna and Tamara's videos on Platinum website)
- Complete Module 1 – Getting Market Ready
- Complete Module 2 – Peg in the Sand
- Listen To Meditation Recording (Bottom Of Platinum Website Landing Page)
- Fill out Module 2 Appendix – Peg in the Sand & Insert into Summary Notes Folder
- Complete Module 3 – Strategy and Locations
- Complete Module 4 – Finding Deals
- Complete Module 5 – Characteristics and Site Research
- Complete Module 6 – Feasibility and Reverse Feasibility
- Complete Module 7 – Contracts and Due Diligence
- Complete Module 8 – Finance
- Complete Module 9 – Influence and Sales Strategy
- Complete Module 10 – Growth Strategy Checklists
- Complete Module 11 – Income Strategy Checklists
- Complete Module 12 – 2 Year Plan
- Complete Your 2 Year Plan & Insert into Summary Notes Folder

**Note:** Tick all boxes, sign, date, and email a copy to your coach





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PROPERTY BLUEPRINT  
ROAD-MAP NOTES

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## PROPERTY BLUEPRINT ROAD-MAP NOTES

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Insert your Property Blueprint Road-map Consultation Notes





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MY 7 DAY GOALS

## MY 7 DAY GOALS

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## MY MONTHLY GOALS

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MY MONTHLY GOALS









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## MY MARKET READY CHECKLIST

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MY MARKET  
READY CHECKLIST

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# Getting Market Ready Checklist




**Instructions:**

- ✔ Use this checklist to keep you accountable in the process of getting market ready.
- ✔ Tick off items as you are doing them and once done!!
- ✔ Refer to Module 1 for a detailed explanation on each item.

## Checklist

	<b>Doing</b>	<b>Done</b>
✔ Review Existing Structures		
• Principal Place of Residence (PPR)	<input type="checkbox"/>	<input type="checkbox"/>
• Investment Properties	<input type="checkbox"/>	<input type="checkbox"/>
• Businesses etc.	<input type="checkbox"/>	<input type="checkbox"/>
• Create Flowchart of Existing Interrelated Structures	<input type="checkbox"/>	<input type="checkbox"/>
✔ Set Up New Structure/s	<input type="checkbox"/>	<input type="checkbox"/>
✔ Review/Setup Personal Insurances		
• Income Protection	<input type="checkbox"/>	<input type="checkbox"/>
• Life	<input type="checkbox"/>	<input type="checkbox"/>
• Trauma	<input type="checkbox"/>	<input type="checkbox"/>
• Total and Permanent Disability	<input type="checkbox"/>	<input type="checkbox"/>
✔ Review/Setup Asset Insurances		
• Building	<input type="checkbox"/>	<input type="checkbox"/>
• Contents	<input type="checkbox"/>	<input type="checkbox"/>
• Public Liability	<input type="checkbox"/>	<input type="checkbox"/>
• Home Worker’s Compensation	<input type="checkbox"/>	<input type="checkbox"/>
• Landlord	<input type="checkbox"/>	<input type="checkbox"/>
• Auto	<input type="checkbox"/>	<input type="checkbox"/>
• Business or Key Person	<input type="checkbox"/>	<input type="checkbox"/>
• Pet etc.	<input type="checkbox"/>	<input type="checkbox"/>
✔ Review Existing Property		
• Review Current Market Values	<input type="checkbox"/>	<input type="checkbox"/>
• Review Current Rental Rate	<input type="checkbox"/>	<input type="checkbox"/>
• Compile Current Rental Statements	<input type="checkbox"/>	<input type="checkbox"/>

	<b>Doing</b>	<b>Done</b>
• Compile Current Loan Statements	<input type="checkbox"/>	<input type="checkbox"/>
• Compile Current Lease Agreements	<input type="checkbox"/>	<input type="checkbox"/>
• Review Loan Documents re: Security Property for Each Loan – Determine if Cross Securitised	<input type="checkbox"/>	<input type="checkbox"/>
• Review Loans re: Terms, Rates etc.	<input type="checkbox"/>	<input type="checkbox"/>
 Review Portfolio		
• Complete Property Analysis (Module 1 Appendix)	<input type="checkbox"/>	<input type="checkbox"/>
• Identify Property/s Holding You Back, Review Benefit of Selling, Review Saleability	<input type="checkbox"/>	<input type="checkbox"/>
• Confirm Properties are Rented at Market Rent	<input type="checkbox"/>	<input type="checkbox"/>
• Consider if Properties can be Legally Rented at Dual Occupancy or Rent By Room	<input type="checkbox"/>	<input type="checkbox"/>
• Consider if You Can Add Services to Increase Rent (Pay TV, Pool, Garden Maintenance, Furnished etc.)	<input type="checkbox"/>	<input type="checkbox"/>
• Review Merit of Renovating for Rental and Value Increase	<input type="checkbox"/>	<input type="checkbox"/>
• Review Manufactured Growth Opportunity (e.g. Multi dwelling, Strata title, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
 Review Finances		
• Compile and Review Current Personal Loan Statements	<input type="checkbox"/>	<input type="checkbox"/>
• Compile and Review Credit Card/Store Card Statements	<input type="checkbox"/>	<input type="checkbox"/>
• Compile and Review Private Loan Information	<input type="checkbox"/>	<input type="checkbox"/>
• Compile and Review Car Loan Statements/Leases/Hire Purchase	<input type="checkbox"/>	<input type="checkbox"/>
• Compile and Review Last Two Years Tax Returns – Individuals and Structures	<input type="checkbox"/>	<input type="checkbox"/>
• Compile Evidence of Income (Pay Slips, Tax Returns if Self Employed, Share Dividend Statements)	<input type="checkbox"/>	<input type="checkbox"/>
• Compile Bank Statements of Term Deposits/Savings	<input type="checkbox"/>	<input type="checkbox"/>
• Review Other Significant Assets – Current Market Value, Adequately Insured, Saleability	<input type="checkbox"/>	<input type="checkbox"/>
• Review Superannuation Policies – Compile Last Two Years Statements	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Determine Asset and Liability Position	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Determine Borrowing Capacity	<input type="checkbox"/>	<input type="checkbox"/>

	<b>Doing</b>	<b>Done</b>
• Review/Determine Loan Servicability	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Determine Available Equity/Cash	<input type="checkbox"/>	<input type="checkbox"/>
 <b>Review/Set Up Wills</b>		
• Locate and Review Existing Will	<input type="checkbox"/>	<input type="checkbox"/>
• Update Will if Over 5 Years Old	<input type="checkbox"/>	<input type="checkbox"/>
• Update Will if Your Circumstances Have Changed (Name Change, Children, Death, Divorce, New Property/s, New Structures	<input type="checkbox"/>	<input type="checkbox"/>
• Review if Tax Effective	<input type="checkbox"/>	<input type="checkbox"/>
• Retain Copy with Solicitor and You	<input type="checkbox"/>	<input type="checkbox"/>
 <b>Review/Set Up Estate Planning</b>		
• Review/Set Up Enduring Power of Attorney – Long Term Incapacities	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Consider Set Up Temporary Power of Attorney – Short Term Incapacities	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Consider Set Up Health Directive	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Consider Organ Donation Directive – Make Known to Others	<input type="checkbox"/>	<input type="checkbox"/>
• Consider if You Wanted to be Buried or Cremated and What Done With Ashes	<input type="checkbox"/>	<input type="checkbox"/>
 <b>Review Personal Management</b>		
• Declutter/Organise Home and Office Space	<input type="checkbox"/>	<input type="checkbox"/>
• Review Time Management (Time Tracker – Module 1 Appendix),	<input type="checkbox"/>	<input type="checkbox"/>
• Start Using Diary	<input type="checkbox"/>	<input type="checkbox"/>
• Start Take Notes (Every Phone Call, Meeting, Great Ideas)	<input type="checkbox"/>	<input type="checkbox"/>
• Start Make Lists	<input type="checkbox"/>	<input type="checkbox"/>
• Complete Daily Task Lists	<input type="checkbox"/>	<input type="checkbox"/>
• Complete Weekly Task Lists (Template Summary Folder)	<input type="checkbox"/>	<input type="checkbox"/>
• Complete Monthly Task Lists (Template Summary Folder)	<input type="checkbox"/>	<input type="checkbox"/>
• Update Skills (Computer, Excel, Bookkeeping)	<input type="checkbox"/>	<input type="checkbox"/>
• Complete Seven Daily Rituals	<input type="checkbox"/>	<input type="checkbox"/>





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## MY PEG IN THE SAND

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MY PEG IN THE SAND



Insert your Peg in The Sand Journal from Module 2 once complete

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## MY TWO YEAR PLAN

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Insert your 2 Year Plan from Module 12 once complete





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INDUCTION WEBINAR  
SERIES NOTES

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## INDUCTION WEBINAR SERIES NOTES

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Insert your Induction Webinar Notes once complete

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## MONTHLY MASTERMIND EVENT NOTES

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MONTHLY MASTERMIND  
EVENT NOTES



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Insert your Monthly Mastermind Event Notes once complete

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## UBL PROFILE

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UBL PROFILE



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Insert your UBL Profile, Webinar Notes & Support Documents

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