

INVESTOR BLIND SPOT SELF-ASSESSMENT CHECKLIST

Thank you for attending Sunny Kochar's presentation on
'The 3 Financial Blind Spots' at #InvestorSocial!

This checklist is designed to help you quickly assess if these common pitfalls might be impacting your real estate investment portfolio and your journey to financial freedom. Be honest with your answers – this is for your eyes only and the first step towards clarity!"

BLIND SPOT #1: THE "SILENT DRAIN" INEFFICIENT CAPITAL & TAX LEAKAGE

Are you maximizing every dollar and minimizing unnecessary tax burdens?

- ☒ Have I reviewed my investment property ownership structures for tax efficiency in the last 1-2 years?
[] Unsure? [] No [] Yes
- ☒ Do I clearly understand the after-tax return on all my major real estate assets?
[] Unsure? [] No [] Yes
- ☒ Am I confident I'm utilizing all legitimate tax deductions and credits available to me as a Canadian real estate investor?
[] Unsure? [] No [] Yes
- ☒ Is my investment capital (including any 'lazy equity' in existing properties) strategically deployed for optimal growth?
[] Unsure? [] No [] Yes

BLIND SPOT #2: THE "ACTIVITY TRAP" CHASING DEALS WITHOUT A CLEAR FINANCIAL BLUEPRINT

Is every investment decision a calculated step towards YOUR specific vision of financial freedom?

- ☒ Do I have a written, long-term financial blueprint that clearly defines my financial freedom number and timeline?
[] Unsure? [] No [] Yes
- ☒ Before acquiring a new property, do I rigorously assess how it specifically aligns with and accelerates my progress towards that blueprint?
[] Unsure? [] No [] Yes
- ☒ Am I confident that my current debt levels and portfolio leverage are sustainable and aligned with my risk tolerance and long-term plan?
[] Unsure? [] No [] Yes
- ☒ Do I sometimes feel pressured to jump on "hot deals" without fully vetting them against my core financial objectives?
[] Unsure? [] No [] Yes
- ☒ Is my portfolio a collection of individual deals, or is it a cohesively structured engine designed to meet my specific passive income and generational wealth goals?
[] Unsure? [] No [] Yes

Are you tracking what TRULY matters for your financial freedom and proactively managing your portfolio?

- ☒ Beyond the number of properties or gross rent, do I regularly track key performance indicators (KPIs) like net worth growth rate, true net cash flow per door, and return on equity for my entire portfolio after current tax on personal and corporate passive income, future tax (Capital Gains on estate transfer), inflation and cost of borrowing?
☐ Unsure? ☐ No ☐ Yes
- ☒ Do I have a system for proactively reviewing my portfolio's performance (at least annually) and making strategic adjustments based on these KPIs and market changes?
☐ Unsure? ☐ No ☐ Yes
- ☒ Am I clear on the leading indicators that signal whether my current strategy needs a course correction?
☐ Unsure? ☐ No ☐ Yes
- ☒ Do I feel like I'm often reacting to problems in my portfolio rather than anticipating and preventing them?
☐ Unsure? ☐ No ☐ Yes
- ☒ Are my financial reviews focused on a clear set of personalized metrics that directly measure progress towards my definition of financial success?
☐ Unsure? ☐ No ☐ Yes

Interpreting Your Checklist:

If you answered 'Unsure' or 'No' to several of these questions, it's a strong indicator that one or more of these financial blind spots might be hindering your progress. But don't worry – awareness is the first step to empowerment!"

Let's turn those blind spots into breakthroughs.

Ready to gain clarity and craft a powerful strategy to address these blind spots?

Book Your Complimentary 30-Minute Financial Strategy Call with Sunny Kochar!

<https://hexavision.ca/get-started>

Scan the QR Code or Visit:

Hexavision Enterprise | sunny@hexavision.ca | [Hexavision.ca](https://hexavision.ca)

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