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How To Manage  
Your Notes Wisely  
**& WHY IT'S  
EASIER THAN  
YOU THINK**

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As the old adage goes, 'time is money'. And since you are already someone who is actively investing in notes, you'll know this could not be truer.

But let's face it, not everyone is a pro at managing their time and even more so when it comes to managing their notes without having to spend a lot of time doing so.

So how do you strike the balance? Effectively balance the amount of time and attention you need to give your note investments and still not lose too much time in the process? How do you make sure you are giving your note investments the right amount of attention without neglecting them while also not losing focus on other areas of your life?

But, that's why you're here because it is most certainly possible.

So let's get into how to manage your notes wisely.

Let's go





# The Three Golden Rules

When it comes to managing your notes, the best way to look after the investments is to make sure you stay on top of them. That means, knowing when things need to be renewed, when to follow up, and generally making sure that everything is as it should be with the note. So, we like to keep it really simple when managing this process by following these 3 rules:

## #1 Document Your Plan With Each Note

Every investor has their own strategy when they invest. While some may be looking for income, others want to build their long-term wealth. Some want to achieve both. The reason this matters is because depending on the strategy you choose, you need to choose the type of assets to purchase and how you intend to profit from your investments.

To be profitable from note investing requires very clear planning. This is why you need to document your plan for each of your notes and make sure that you update the plan as and when things change.

This documentation process is a must for you to stay on track of your investments.

## #2 Document The Next Step For Each Note And When It's Due

As you manage your notes, there are certain steps to follow. Then, of course, there are the issues that arise.

It's therefore really important that you keep track of what next steps are supposed to take place with each note. Since your notes won't all be in the same stage at the same time they will likely require different 'next steps'.

Where it tends to get tricky here is when your portfolio is growing and you need to keep track of each of your notes and what needs to happen next and when.

Now, if you are manually managing your portfolio, this is where it may become really time-consuming you may find yourself spending a lot of time re-reading the same material each time you go back to manage your notes looking for what you should be doing next.

The problem with this scenario is that you wind up spending a lot of time on the not-so-important stuff while ignoring the important stuff without even realizing it.

The last thing you want or need is when those urgent tasks that slip through the cracks turn into emergencies that end up costing you a lot of time and/or money.

But before you run for the hills, breathe easy because there is a system we've created for this exact purpose.

In a nutshell, it's an online based software that you log into from anywhere. It is structured so you write down your next steps on each note as well as when the next step is due.

That way, instead of looking wasting time trying to figure out what your next step should be, you simply open your dashboard and check which notes have steps due and when.

The next steps are automatically sorted by due date so you know exactly what to work on next.

So you stay on top of what you need to be working on and you spend less time doing so. Win-win!

In case you want to check this system out ([CLICK HERE](#))

### 3. Keep Your Information With You At All Times

Again, this is something that doesn't sound complicated but considering how much manual paperwork you can accumulate as your note portfolio grows, it can turn into a near-impossible task.

Say, for example, you're on vacation with your family and you realize you need to supply some kind of information for a deal that may be pending or involves an investor.

You get a request for some information and you need to go into your portfolio notes and find that info as it's a time-sensitive request.

Would you realistically bring along all your documents on vacation?

So this is another scenario where our system comes in really handy.





All your portfolio documents, notes, and information is stored on the system which means that as long as you have an active internet connection and a browser (or the app), you can access your information at anytime, anywhere.

So, instead of needing to bring everything around with you (because who would want to honestly do that?), all you need to do is log in to the system, pull the info you need and presto, you're done and you can go back to hanging out at the poolside with your family.



## Get A Daily Routine Going

Like we mentioned before, note investment requires planning. For this to happen you need to understand what your role as the investor would ideally be every day. If you can get into a routine with your portfolio, it will make things easier to manage and will feel well-planned and organized.

Take the following scenario with someone using the Portfolio Activity Center and how they plan their daily note upkeep. This person takes 15 minutes to check their next steps and due dates.

They work on a note, get the next step done, and before they move on to the next note or go hang out with their family, they document the next step for this note and when that step is due. The key observation here is that when you are done working on a note, you are very clear on what needs to happen next.

Take the extra 30 seconds before moving on to your next task to write down what needs to happen next and when it is due. This will save you so much time.

With the system, you will always have this data at your fingertips. You will no longer have to check your notes to figure out what to do next



Another scenario that you may find you spend too much time on is your purchase flow. The Portfolio Activity Center guides you through the process so that you don't miss anything and you know exactly what your next steps are. The system has a step-by-step guide for what needs to happen before, during, and after a purchase so you will never feel like you are lost or unsure during such a time.

Lastly, you may find yourself trying to explain a note to someone. Your family may ask how things are going, your friends, or other note investors. Those of you that manage other people's money and need to report on status to those investors will really benefit from the keeping the note's "Story" up to date. This is a small section in each note where you write down how things are going. Just a few bullets of text that jog your memory on the progress, or lack thereof, on each note. Having this "Story" on hand and available at the click of a button is really helpful and helps you feel and appear organized.

## How To Safeguard Your Investments

Whether you have notes that are performing or non-performing you need to ensure that you are monitoring them so you are aware of how things are going and you are certain they are progressing as you expect them to.

Even if you have a servicing company that looks after your portfolio, keep in mind that most problems that occur need the investor's intervention.

As we all know, no servicer is perfect and should that company miss something, it can lead to very costly interruptions.

So whether or not you are using a servicing company, make sure you keep your finger on the following things:

- **Insurance policies** - if there are active policies, be sure you know when they expire
- **Property taxes** - do you know if there has been a tax audit done and whether taxes are being paid?
- **Checklists** - reduce or eliminate the mistakes that can take place when managing a note.





## To Conclude...

Generally, it pays to keep the following in mind when managing your notes.

Have a detailed plan for each of your notes and ensure you update that plan accordingly as things change.

Be on top of what needs to happen for each note and when it needs to happen.

Make sure you are tracking the overall status of the note.

Basically, it is possible to manage your notes well without spending a lot of your free time.

Managing your note business should follow a routine instead of finding surprises each time you check in on your portfolio.

Finally, it doesn't need to be a complicated process. By having the right tools in place to help, you can drastically change the way you take care of your portfolio.

The Portfolio Activity Center is the ideal solution for managing your portfolio from anywhere and at any time.

In this eBook, we've given you a really small taste of what this solution can do for you. If you'd like to check out the full potential of the system [CLICK HERE](#) to get going.

