



Trading Psychology 101:

How to Set Up a Psychology Training Plan

PRESENTED BY:

Mike B.

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Mike Baehr

- History Prior to Trading:
 - 23 Years in United State Marine Corps
 - Curriculum Developer
 - BA in Accounting
 - MS in Forensic Accounting
- Trading History:
 - Started Trading in 2008
 - Began Day Trading in 2018
 - Join Bear Bull Traders in 2020
- Trading Strategies:
 - Break High of Day
 - Failed High of Day Break
- Hobbies:
 - Volunteer in the Local Community
 - Cooking
 - Running (Soccer Referree)

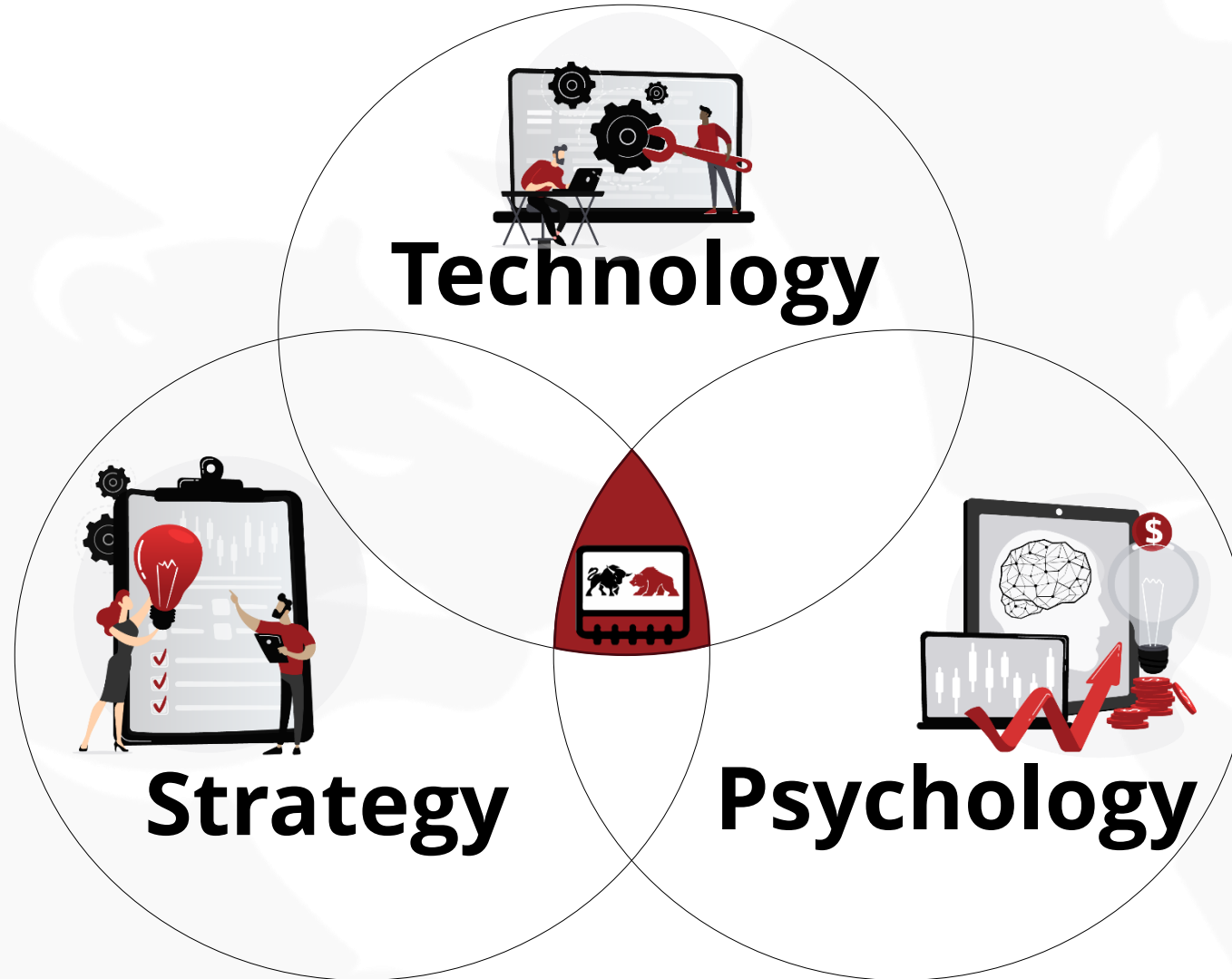


Overview

- Pillars of Trading
- Progression of a Trader
- Psychology Training Plan
- Process for Development
- Resource
- Questions



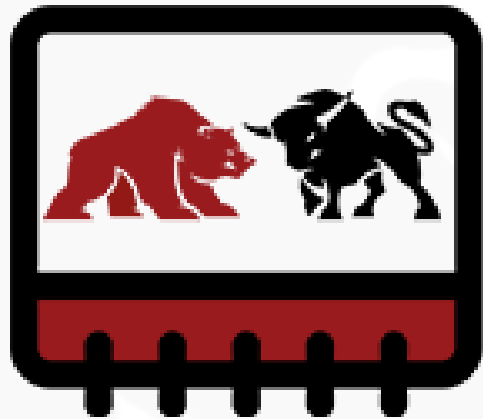
Pillars of Trading



Progression of a Trader



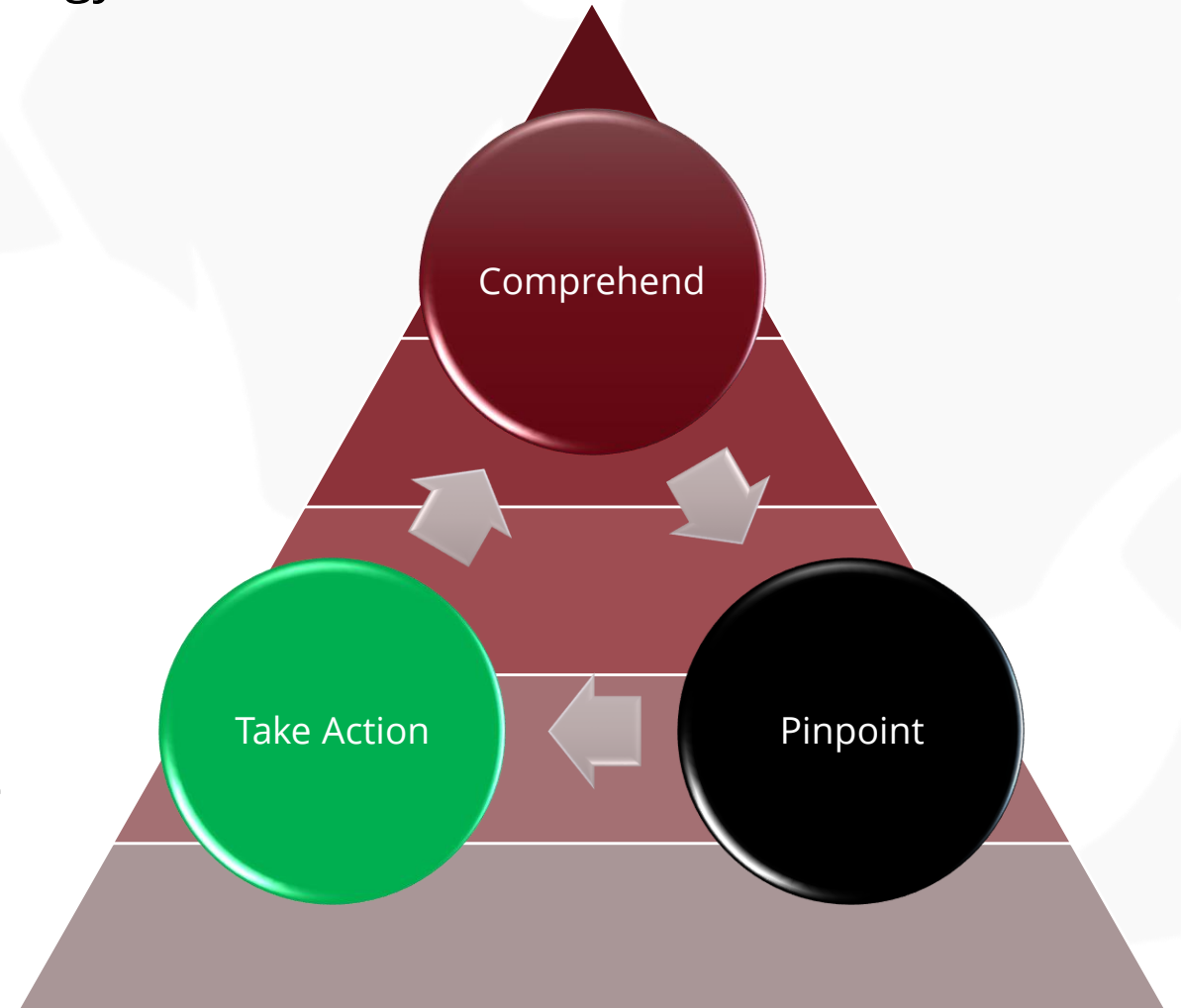
Progression of a Trader



TradeBook

Psychology Training Plan

- Weekly Routine to Develop your Trading Psychology
- Creates Focus
- Mental Capacity Once it filled you go crazy
- Psychology Challenges
- Psychology Tools
- Assist in Matching Proper Tool to the Challenge



Psychology Challenges

Blowing up Accounts

Getting out of Trades too Quickly

Ignoring Daily Loss Limits

Inability to Re-set after a Loss

Moving Stops Outside of Trade Plan

Not Trusting Your Strategy

Overtrading/Taking Trades that Don't Fit Setup

Runs of Red Days

FOMO

Hesitating to Take a Trade

Ignoring Stops

Inability to Re-set after a Win

Indecision Causing Hesitation

Over-focus on P&L

Revenge Trading

Staying in Trades too Long

Trading Results Impacting Personal Life

Psychology Tools

Trading Why

Vision Board

Trading Goals

Visualizations

Imagery

Decision Tree

Progressive Muscle Relaxation

What if Scenarios and Solutions

Performance Profile

Performance Goals

Trading Worksheets

Affirmations

Gratitude

Mindfulness

Habits

Trading Routine

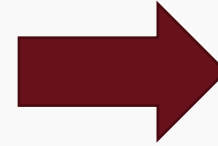
Process for Development



Psychology Journal



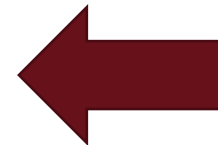
Performance Profile



Identify Top Factors



Performance & Process Goals



Select Proper Psychology Tool



Incorporate into Daily/Weekly Schedule



Process for Development

- Step 1: Develop and Maintain a Psychology Journal

Overall Psychology Reflection

• **What was Good:**

• **What was Bad:**

• **Improvement Area:**

• **Growth that Occurred:**

• **CPT Reflection:**

• **What does the Monkey want to tell me:**

• **Monkey Moment:**

•When:

•Events Preceding:

•Why:



Mike Baehr

Performance Coach

Psychology for Traders

August 17 8:00pm ET

Creating a Psychology Journal

Process for Development

- Step 2: Performance Profile

Physical	Rating/10	Mental, Emotional, Psychological	Rating/10	Technical/Skill	Rating /10	Tactical/ Strategy	Rating/10	Lifestyle	Rating/10



Crède Sheehy-Kelly

Performance Psychologist

The Mental Edge


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Mental Edge: Lesson 1 – Finding Your Mental Edge – Crède

Education Center / Equities / Advanced Course / Mental Edge: Lesson 1 – Finding Your Mental Edge – Crède

Process for Development

- Step 3: Self Reflection to Identify Top Factors

Physical	Rating/10	Mental, Emotional, Psychological	Rating/10	Technical/Skill	Rating /10	Tactical/ Strategy	Rating/10	Lifestyle	Rating/10
Run x 5 ptw	8	PSYCHOLOGY PREPARATION		STOCK IN PLAY		Understanding a Downtrend Market	2	Daily Devotion	10
Stretching x 5ptw	0	Focus on Pre-market Slides	10	Daily Chart Analysis	10	Understanding a Uptrend Market	2	Donations to Missions	7
Strength Training	0	Review of TradeBook Slides	8	Camarilla Pivot Daily Analysis	7	Solid Screen Layout	10	Donations to orphanages	2
Yoga/Balance	0	Review of Game for the Trading Day	9	Identifying TFL	10	Understanding Volume with Candle Formations	5	Donations to community	7
Coordination	0	Conducting Self-awareness Review	8	Weekly Chart Analysis	2	Accepting Probabilities	3	Relationship spouse	7
Target Weight	4	PSYCHOLOGY DURING THE MARKET		Catalyst Analysis	5	Ability to complete Journal	10	Relationship son	5
		Discipline to stick to Trading Rules	9	Determining Top 3 Stocks	10	Monthly Evaluation of TradeBook	8	Relationship daughter	9
		Discipline to stick to Trade Management Plan	2	8:00am Stock Movement	10	Monthly Evaluation of Business Plan	6	Eating Mind Diet	4
		Discipline to stick to Risk Management Plan	10	STOCK ANALYSIS		Trade Plan Development	7	No alcohol day before trading	9
		Discipline to stick to TradeBook Edge	8.8	Proper placement of alerts	10	Risk Management Development	10	Sleep x 8 hours	8
		Discipline to stick to Emotional Response Plan	8	Identifying indicators for BHOD	8	Trade Management Development	5	Water x 6 glasses	1
		Discipline to stick to Pre-market Routine	9	Identifying confirmations for FBO	8	Trading Rules Develop	10	Community work	8
		Focus on the process of trading	6	Identifying confirmations for BHOD	8	Goal Setting	7	Chill out time	2
		Focus on Indicators	7	Identifying confirmations for FBO	8			Relaxation	3
		Focus on Confirmations	7	Setting stop loss at previous candle	8			Meditation	9
		Focus Trade Management Plan	2	Setting stop loss at HOD - Spread	10				
		Focus on Risk Management Plan	10	Double Clicking Stop Loss	8				
		Focus on the TradeBook Edge	8	Making sure Montage is selected	7				
		Focus on the Markets	3	Inputting Entry Order	8				
		Patience to wait for the proper entry	8	Input Entry & Stop into Excel	4				
		Courage to take a proper setup	8	Identifying Profit Target	5				
		Handling Uncertainty after entry a Trade	0	Identifying Risk to Reward Ratio	5				
		Confidence in Trading Rules	10	Revisiting Indicators	3				
		Confidence in Trade Management Plan	5	Revisiting Confirmations	3				
		Confidence in Risk Management Plan	10	Execute BHOD Trade Management Plan	2				
		Confidence in FBO TradeBook Edge	8	Execute FBO Trade Management Plan	2				
		Confidence in BHOD TradeBook Edge	10	Executing Emotional Assessment Plan	8				
		Emotionally able to accept IR Loss	1	Executing Emotional Reaction Plan	2				
		Emotionally able to accept B/E	10						
		Emotionally able to accept small win	10						
		Emotionally able to accept big win	10						
		Emotionally able to accept a missed opportunity	4						
		Emotionally able to accept poor performance	5						
		Handling Anger after a Trade	5						
		Handling Frustration after a Trade	5						
		Handling Doubt after a Trade	8						
		Handling Confidence after a Trade	8						
		Determining if Mind is ready for another trade	7						
		Completion of Psychology Reflection	8						
		Discipline to stick to Journaling	9						
		Discipline to listen to Affirmations x 2	9						



Mike Baehr
Performance Profile
April 2022

Process for Development

- Step 4: Set Performance and Process Goals

PERFORMANCE GOALS		
Goal	Timeframe in which to be achieved	When will I track/ evaluate this
66% or higher execute Trade Management correctly according to BHOD rules	April 2022	Daily
66% or higher execute Trade Management correctly according to FBO rules	April 2022	Daily
66% or higher executed all Trade Management correctly	April 2022	Daily
66% or higher achieved taking the majority of Trades that met my TradeBook Edge	April 2022	Daily
PROCESS GOALS		
Goal	Timeframe in which to be achieved	When will I track/ evaluate this
At least 7 hours sleep each night before trading	Nightly	Track each morning during trading prep, will evaluate consistency on weekly and monthly basis
Complete my Pre-Market Routine	Daily	OneNote Daily Journal, will evaluate consistency on a weekly and monthly basis
Average 3-5 Trades Per Day if Criteria for setup is met	Daily	In the evening when I have finished trading
66% or higher executed all Trades that met setup criteria	Relevant to Every Trade	Excel document and OneNote daily Journal, will evaluate consistency on a weekly and monthly basis
66% or higher execute EAP after Trade	Relevant to Every Trade	Excel document and OneNote daily Journal, will evaluate consistency on a weekly and monthly basis
Achieve 7 or higher average on EAP score	Relevant to Every Trade	Excel document and OneNote daily Journal, will evaluate consistency on a weekly and monthly basis
Conduct a daily trade review	Daily	In the evening when I have finished trading
Complete Psychology Reflection	Daily	OneNote Daily Journal, will evaluate consistency on a weekly and monthly basis



Créde Sheehy-Kelly

Performance Psychologist

The Mental Edge

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Process for Development

- Step 5: Select Proper Tool to Match your Challenge

Tool	What	Why	How Often
Trading Why "Goals"	Vision board Outcome Goal setting	I am not pushing myself outside of my comfort zone because I do not have a reason to put myself in an uncomfortable place	Quarterly Review Review when I need a boost of energy
Affirmations	Money Trust Confidence Risk Taking Safety	I need to reprogram limiting beliefs in these areas, and it helps with my trading	Twice a day When I must enact my emotional response plan
Performance Profile	Self-Review of my current mental state	Highlights 3-5 areas that I need to improve so that I can focus my attention on these areas	Monthly Quarterly
Mediation	Pre-Market Confidence Visualization Profiting from Pressure	Helps me relax and puts my mind on the process of trading. I also want to improve in pressure and confidence	Daily before market opens for pre-market mediation Mon, Wed, Fri Profiting from pressure and confidence
PMR	PMR Mediation	This will help when my anger or frustration gets overwhelming, and I need to sit back and relax	When I score a 6 or below on my emotional assessment
PEMS	Alertness, Focus, Physical, Emotional, Awareness	I use this to assess my state prior to trading. I have found that it benefits me to know where my mindset is for the day	Daily during the pre-market



Créde Sheehy-Kelly

CRÉDE PERFORMANCE

GO DEEP TO
LEVEL UP
YOUR TRADING

THE TRADING PSYCHOLOGY COURSE TO GAIN YOUR MENTAL EDGE
IN JUST 8 WEEKS

Process for Development

- Step 6: Put Tools into your Daily/Weekly Schedule

The screenshot displays the Microsoft Outlook calendar interface. The main view is a weekly calendar for July 17-23, 2022, in Camarillo, California. The calendar is set to 'Week' view. The interface includes a search bar at the top, a ribbon with tabs for 'File', 'Home', 'Send / Receive', 'Folder', 'View', and 'Help'. The ribbon contains various icons for creating and managing calendar items, such as 'New Appointment', 'New Meeting', 'New Items', 'Today', 'Next 7 Days', 'Day', 'Work Week', 'Week', 'Month', 'Schedule View', 'Open Calendar', 'Calendar Groups', 'E-mail Calendar', 'Share Calendar', 'Publish Online', and 'Calendar Permissions'. The calendar grid shows events for each day of the week. The events are as follows:

Day	Event
Sunday (17)	None
Monday (18)	Self Awareness Reflection; PEMS, Pr (8 AM - 9 AM) Affirmations; f (9 AM - 10 AM) Pre-Market Mt (9 AM - 10 AM) Education Meeting; Google Meet (12 PM - 1 PM) Exercise Run 3-5 Miles (1 PM - 2 PM)
Tuesday (19)	Self Awareness Reflection; PEMS, Pr (8 AM - 9 AM) Affirmations; f (9 AM - 10 AM) Pre-Market Mt (9 AM - 10 AM) Exercise Run 3-5 Miles (1 PM - 2 PM)
Wednesday (20)	Self Awareness Reflection; PEMS, Pr (8 AM - 9 AM) Affirmations; f (9 AM - 10 AM) Pre-Market Mt (9 AM - 10 AM) PCT Morning Meeting PCT Meeting Room (11 AM - 12 PM) Exercise Run 3-5 Miles (1 PM - 2 PM) Psychology Segment Chatroom (2 PM - 3 PM) Closing Bell Show Chatroom (3 PM - 4 PM) July BBT Team Meeting abiel@bearbulltraders.com (4 PM - 5 PM) TradeBook Meeting PCT Meeting Room (7 PM - 8 PM)
Thursday (21)	Self Awareness Reflection; PEMS, Pr (8 AM - 9 AM) Affirmations; f (9 AM - 10 AM) Pre-Market Mt (9 AM - 10 AM) ID Appointment Air Reserve Base (12 PM - 1 PM) Exercise Run 3-5 Miles (1 PM - 2 PM) Closing Bell Show Chatroom (3 PM - 4 PM) Nicole Kehoe Appointment; Santa Pa (5 PM - 6 PM) Psychology Webinar BBT Webinar Room (8 PM - 9 PM)
Friday (22)	Self Awareness Reflection; PEMS, Pr (8 AM - 9 AM) Affirmations; f (9 AM - 10 AM) Pre-Market Mt (9 AM - 10 AM) Exercise Run 3-5 Miles (1 PM - 2 PM) Closing Bell Show Chatroom (3 PM - 4 PM) Mediation Improvement; Profiting 1 (5 PM - 6 PM)
Saturday (23)	None

Process for Development

- Step 6: Put Tools into your Daily/Weekly Schedule

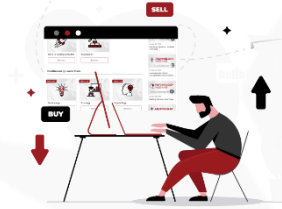
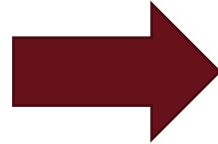
Mental Trading Plan

Mental Category	Mental Tool	Time
Self-Awareness	PEMS	0500-0530
	Premarket Slides	0500-0530
	TradeBook Slides	0500-0530
Affirmations	Money Trust Confidence Risk Taking Safety	0600-0615
Pre-market Mediation	Créde Pre-Market Mediation	0615-0630
PMR Mediation	Créde PMR Recording	When a score of 6 or less on ERP
Exercise	Daily	After Morning Session
Psychology Reflection	Good Bad Improvement Monkey	After Trading Complete
Mediation Improvement	Confidence Profiting from Pressure Quiet your inner critic Finishing Breakthrough Image	Monday Wednesday Friday after trading

Process for Development



Psychology Journal



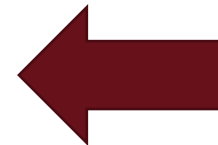
Performance Profile



Identify Top Factors



Performance & Process Goals



Select Proper Psychology Tool




Incorporate into Daily/Weekly Schedule




Resources

- Créde Course: Go Deep to Level Up



The Mental Edge

Course Description: Master Your Mindset and Take Control of Your Trading



Créde Sheehy-Kelly, Performance Psychologist

Lessons in this course

Lesson 1: Find Your Mental Edge

Lesson 2: Discovering Your Inner Demons Through Self Reflection


Lesson 3: How to Identify Negative Thinking

Lesson 4: Harnessing Cognition for Peak Performance

Lesson 5: The Art of Setting Goals

Lesson 6: Utilizing Mental Imagery

Lesson 7: Putting the Pieces Together



About this course

You can set the foundation of your mental edge by applying frameworks and techniques that have been successfully implemented in professional sports for many years:

- Become crystal clear on your motivation for trading
- Forensically analyze your current strengths and areas of weakness
- Create your own personalized Trading Performance Profile
- The complete trading psychology system to gain your mental edge in just 8 weeks

[Get Started Now](#)

Go Deep to Level Up Your Trading With Créde

[Self Paced](#) [Elite Track](#)

Limited time offer for BBT Members *Affiliate Links





Useful icons



TradeBook



Trilogy of Trading Success



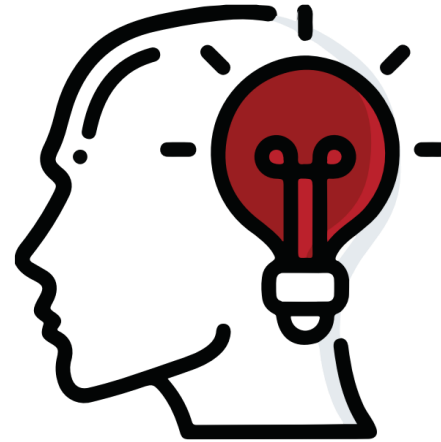
Technology

Mondays



Strategy

Tuesdays



Psychology

Wednesdays



Mentorship

Thursdays

Psychology Challenge

- Blowing up account
- FOMO
- Getting out of trades too quickly
- Hesitating to take a trade
- Ignoring Daily loss limits
- Ignoring Stops
- Inability to re-set after a loss
- Inability to re-set after a win
- Indecision causing hesitation in taking trades
- Moving stops in a way that is outside of trade plan
- Not trusting my strategy
- Over-focus on P&L
- Overtrading/taking trades that don't fit setup criteria
- Revenge trading
- Runs of red day
- Staying in trades too long
- Trading results impacting personal life

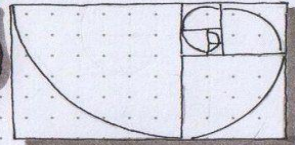
Psychology Tools

- Tools:
 - Trading Why
 - Performance Profile
 - Vision Board
 - Performance Goals
 - Trading Goals
 - Worksheets
 - Visualizations
 - Affirmations
 - Imagery
 - Gratitude
 - Decision Tree
 - Mindfulness
 - Progressive Muscle Relaxation
 - Habits
 - What If Scenarios and Solutions
 - Routines

FINDING WHY IS A PROCESS OF DISCOVERY NOT INVENTION

START WITH WHY

THE "WHY" NEVER CHANGES THE "WHAT" DOES



- WHY**
- ▶ PEOPLE WILL CONTRIBUTE
 - ▶ GAIN INNER STRENGTH
 - ▶ SEEK CONTINUAL IMPROVEMENT

WHY → LIMBIC BRAIN

WHAT → NEOCORTEX

- ▶ ORDER
- ▶ PREDICTABILITY
- ▶ MULTI APPLICATION

- NEED TO BELONG
- BUY INTO A CAUSE
- SAFETY & INSPIRATION
- LOYALTY
- BONDED BY SHARED VISION

MANAGE Trust

- ENABLE RISK
- IS EARNED
- BE DEMONSTRATED
- CONSISTENCY

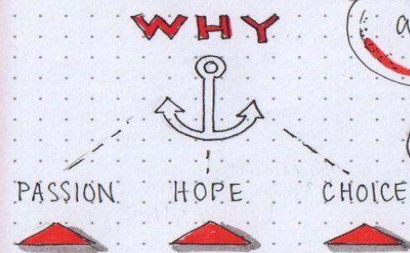
successful succession aligns to the why



SIMON SINEK

PEOPLE DON'T BUY WHAT YOU DO THEY BUY WHY YOU DO IT

Aligned & Balanced

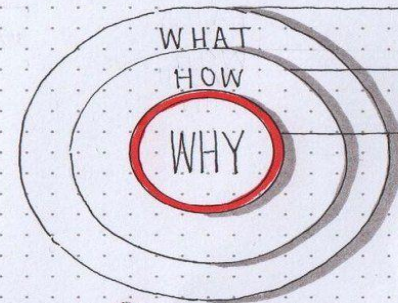
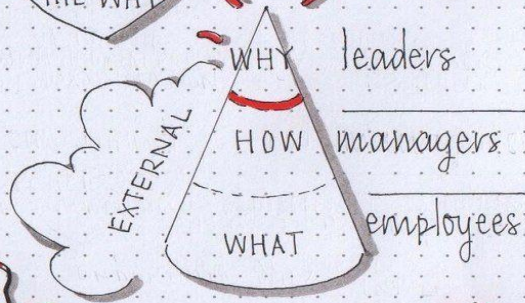


FIND A WAY TO MEASURE THE WHY

people often confuse WHY with WHAT and lose structure

INSPIRING LEADER

- ▶ GAME CHANGER
- ▶ ABLE TO INFLUENCE
- ▶ CAUSE OF ACTION
- ▶ STAND OUT - STAND UP
- ▶ CREATE IMPACT
- ▶ VISION OF THE FUTURE



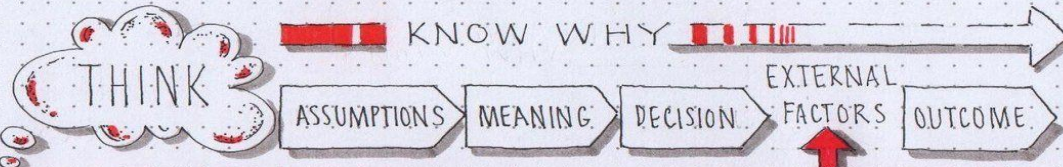
- PRODUCED ▶ CONSISTENCY **3** RESULT
- PROCESS ▶ DISCIPLINE **2** ACTION
- PURPOSE ▶ CLARITY **1** BELIEF

DECISION CERTAINTY
THINK | FEEL | KNOW
WHAT | HOW | WHY

Influence

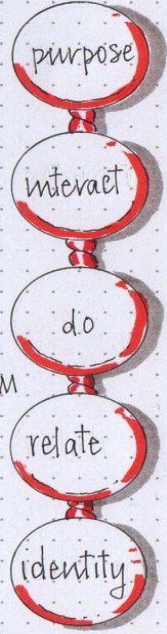
- ▶ INSPIRE ★ charisma
- ▶ MANIPULATE ▶ price | promotion | fear | short term | transaction

- ▲ TRANSFORM
- ▲ CHALLENGE NORM
- ▲ INNOVATE
- ▲ AUTHENTIC
- ▲ EMPOWER



WHEN DRIVEN BY 'WHY' SUCCESS JUST SHOWS UP

GLAS. LIFE



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Edge of Your Trading

