



From The Beginning: Developing a 3-month Trading Education Plan

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Learning Objectives

- ✓ Understand your trading motivations
- ✓ Develop a realistic trading plan
- ✓ Set (Reset?) expectations

Why are you trading?









Why are you creating a plan?











it's *a* plan,

not the plan



Overall Plan



You
are
here

Your
goal



Overall Plan



What to do - Month 1

Learn

Daily

- Read everything you can
- Watch YouTube videos
- Take courses
- Take notes
- Think about your objectives
- Dream

Weekly

- Review your notes
- Explore and evaluate trading communities
- Take a break!

One-Time

- Dream more
- Dream BIG!

“A wise man can **learn** more from a foolish question that a fool can **learn** from a wise answer.”

-Bruce Lee



What to do – Months 2-3

Plan

Daily

- Start SIM & replay practice trading
- Create a strawman timeline and a Trading Plan
- Build initial strategy(ies)
- Create a journal template and refine it
- Read more and take more notes
- Write out your objectives and keep dreaming!

Weekly

- Envision execution
- Read your strategy(ies) and plans out loud

One-Time

- Pick your tools
- Join a trading community
- Set-up your simulation account (SIM)

“A good **plan**...executed now is better than a perfect **plan** executed next week.”

-George S. Patton



BearBull Traders Lesson Plan

- **1: Developing a 3-Month Education Plan**
- **2: Identifying a Strategy to Trade**
- **3: Create and Maintain a Trading Journal**
- **4: Setting Up Your Trading Desk**
- **5: Fundamentals of Risk Management**
- **6: Fundamentals of Trade Management**
- **7: Fundamentals of Profit Taking**
- **8: Handling Setbacks in Trading**
- **9: Develop Your TradeBook**
- **10: How To Transition to Live Trading**



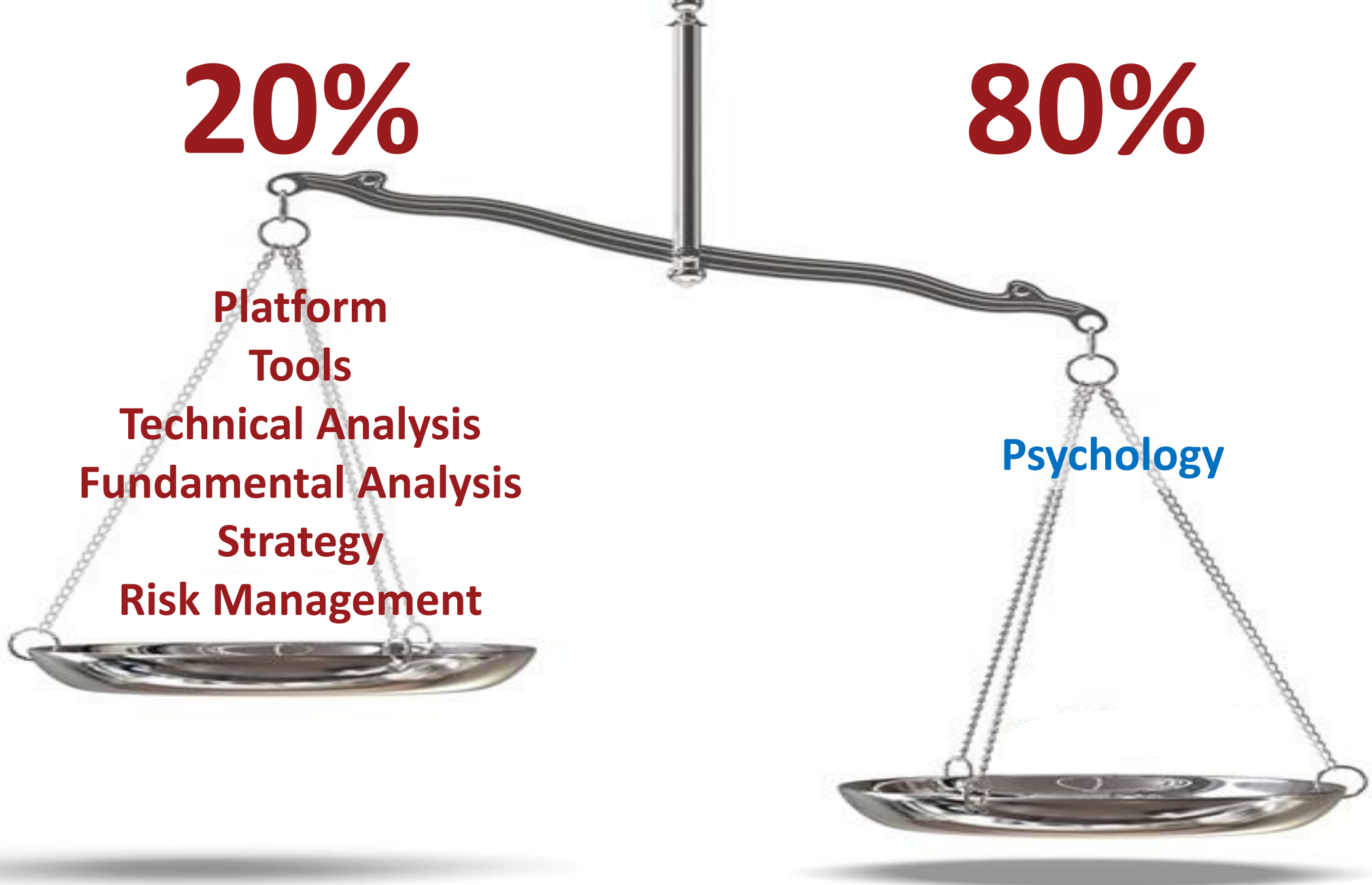
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**Platform
Tools**

**Technical Analysis
Fundamental Analysis
Strategy
Risk Management**

Psychology



The Goal

**Consistently
Profitable
Trader**



The Goal

Zero 'HULK' days

Buy a Lambo
Replace current salary

\$10/day

No losing months

Average of
\$100k/yr
over any 5
year period

**“Consistently
Profitable”**

Enough
to retire
in 10
years

No more than 2
losing days/week

No losing years

\$1,000/day
\$10,000/day







Year 1

Year 3

Year X





Year 1

Year 3

Year X



The Goal

**“How long will it
take until I am
consistently
profitable”?**



The Goal

~ 90% fail

~ 2% > 5 years

~ 2% 3-5 years

~ 1% < 3 years

~ 5% are never a CPT*



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