



1. Create Your Trading Strategy

5 STEP TRADING PLAN



Is this you?

- ✓ Opened a Brokerage account

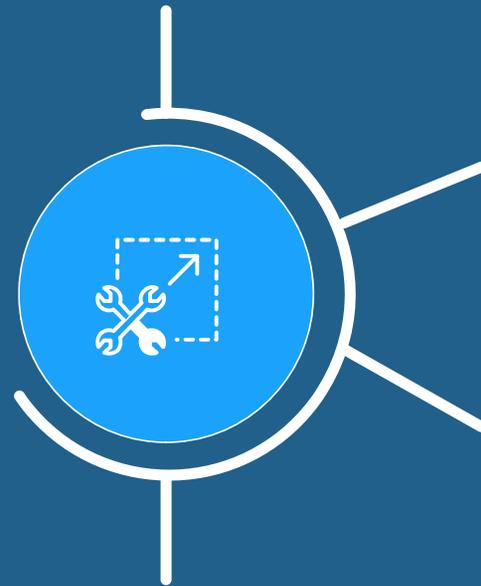
- ✓ Placed at least 1 trade

- ✓ Interested in learning an approach to confidently trade more

Need to open a Brokerage account?
fidelity.com/trading

5 Steps to Develop a Trading Plan

1. Create Strategy



2. Find Ideas

3. Prepare for a Trade

4. Place a Trade

5. Monitor Post-Trade

Getting into a Trader's Mindset



What's the difference
between **trading** and
investing?

A key difference is time:

Trading

Use shorter-term strategies for a short or long-term goal

Investing

Use for a longer-term goal, like retirement, or potentially build wealth

Why is a Trading Strategy Important?



Reduces the impact
of **emotions** and **loss
aversion** from getting
in the way

Having a strategy can help you:

Define rules to bring discipline to
your trading

Understand your risk

Align your goals over different
time horizons

Creating Your Own Trading Strategy



Capture the **rules** you set for yourself and **stick to them**

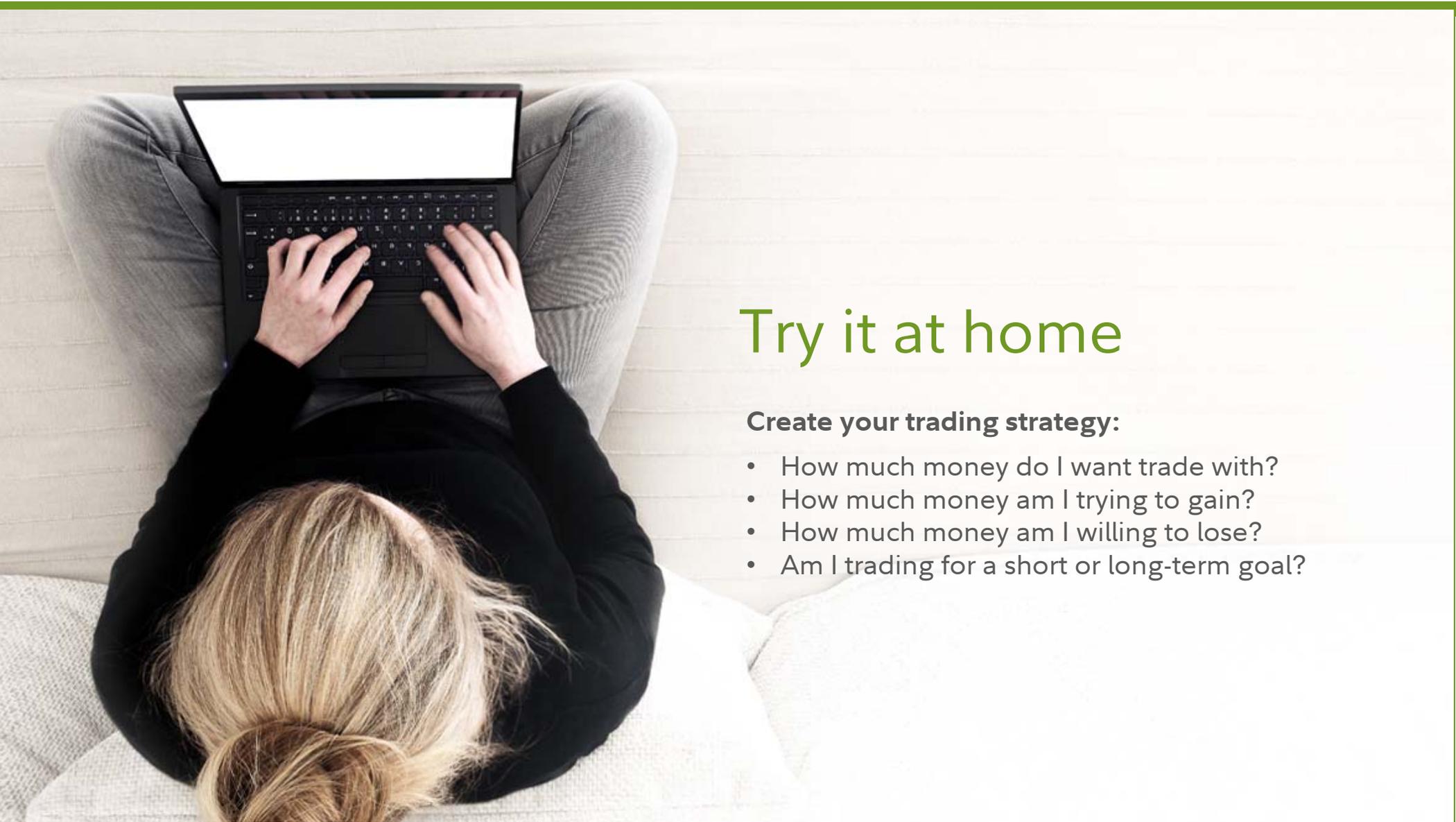
Consider:

Set realistic profit targets

Determine a risk level for your portfolio

Know what you're trading and why

Track your progress



Try it at home

Create your trading strategy:

- How much money do I want trade with?
- How much money am I trying to gain?
- How much money am I willing to lose?
- Am I trading for a short or long-term goal?

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