



# 5. Keep a Pulse on Your Account

**5 STEP TRADING PLAN**



# 5 Steps to Develop a Trading Plan

## 5. Monitor Post-Trade



## What to do After You Place a Trade

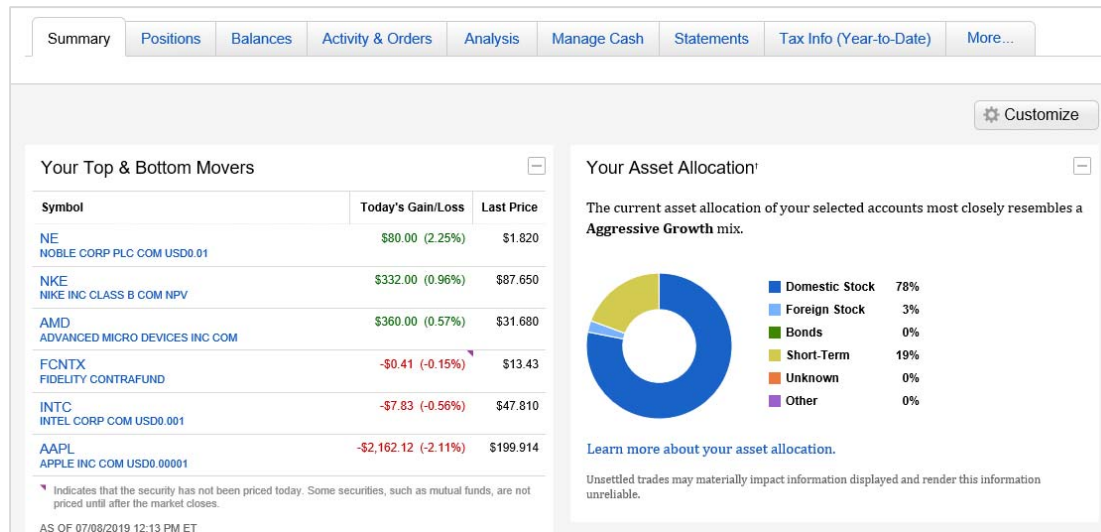


Review your trading performance in order to **refine your process** and **improve your overall strategy**

### **Keep it in context:**

Track against the goals you set  
—  
Evaluate performance between comparable trades

# Keep a Pulse on Your Account



## Use your portfolio summary to:

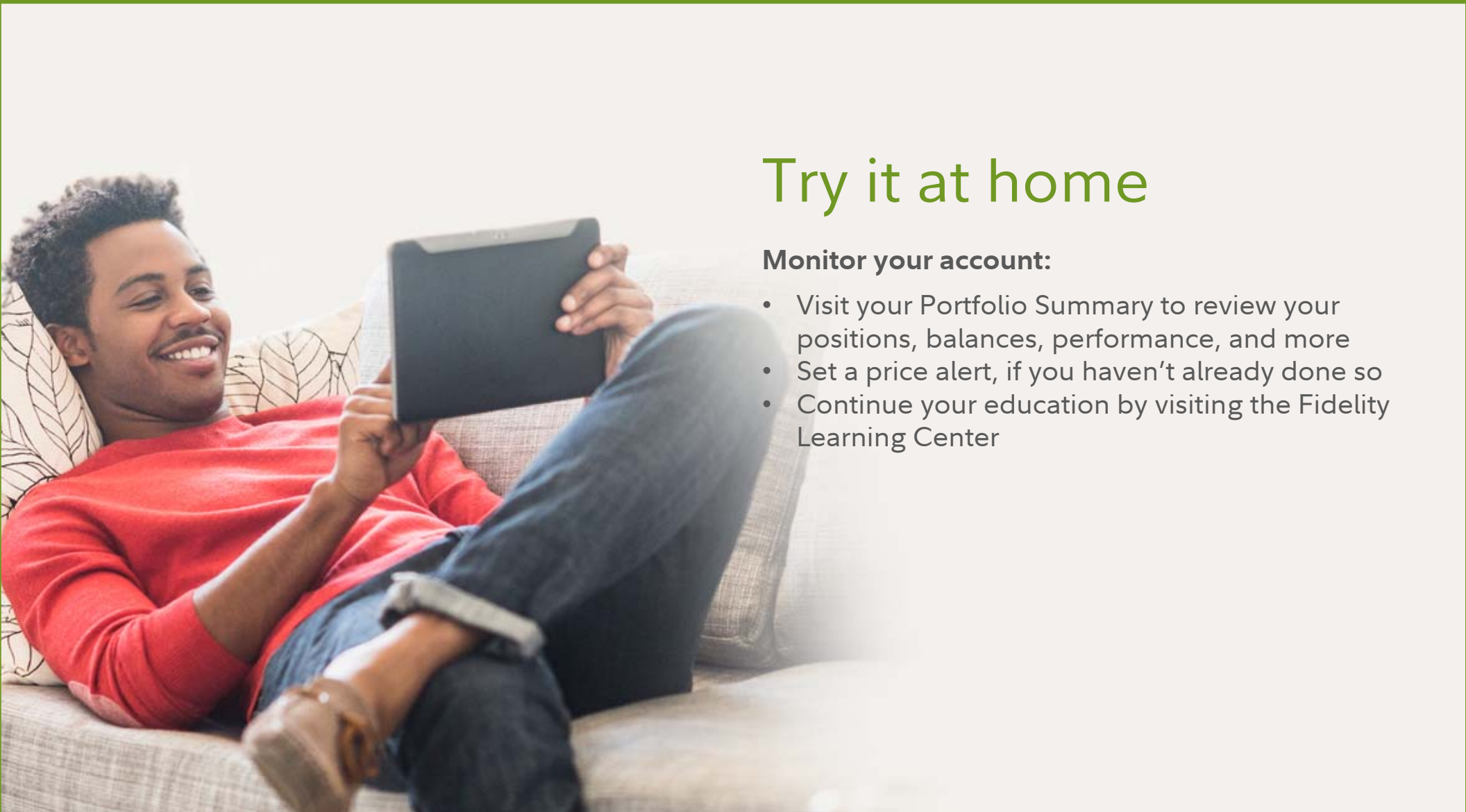
Monitor your positions

Review your balances

Track your open orders

Evaluate your performance

Screenshot is for illustrative purposes only.



## Try it at home

### **Monitor your account:**

- Visit your Portfolio Summary to review your positions, balances, performance, and more
- Set a price alert, if you haven't already done so
- Continue your education by visiting the Fidelity Learning Center

# Thank you!



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