

TRADER GOAL SHEET

1. How much capital do you currently have available to trade and invest? _____
2. How much of your capital is allocated for your retirement? _____
3. How much capital do you have available for active trading? _____
4. What is your annual % return goal on your overall portfolio? _____
5. How much monthly income do you want to produce trading? _____
6. Where would you rate your risk tolerance on a scale from 1 -10 (1 being you want to take zero risk and 10 being you are susceptible to very high risk)? _____
7. What types of stocks or trading products are of interest to you? _____

8. How much time can you consistently allocate per day to trading? _____
9. When the Stock Market is open at what hours will you fill orders? _____
10. What types of trading strategies will you use for long-term growth and wealth creation?

11. What types of trading strategies will you use for shorter-term income generation?

12. What type of money management system will you follow? _____

13. Will you reinvest trading profits or do you need to take distributions? _____

14. What are your top three goals to achieve as a trader in the next year?

15. What are your top three goals to achieve as a trader in the next 3 years?

16. What are your top three goals to achieve as a trader in the next 5 years?

16. What are your top three goals to achieve as a trader in the next 10 years?

17. How much money do you want to have put away when you retire? _____

18. How much time do you have until you reach retirement? _____

19. What is your ultimate financial milestone to reach as a trader? _____

20. How will you continue to grow and become a more successful trader for years to come?
