BUILD YOUR TRADING PLAN

A Practical Guide to Written Rules,
Risk Decisions, and Consistent Review



WELCOME

Thank you for choosing

Before the Trade. Write the rules before the pressure.

Hi, and thank you for choosing Before the Trade. We turn trading concepts into clear lessons, visual examples, practice, and a repeatable decision process. Volume Seven helps you assemble the earlier volumes into a usable written plan: purpose, setup, execution, risk, boundaries, and review.

YOUR CONNECTED LEARNING ROADMAP

01 **Identify your trading goal**
Choose the skill you want to strengthen first.

02 **Learn the foundations**
Build vocabulary and risk awareness.

03 **Practice trading questions**
Turn explanations into usable recall.

04 **Recognize candles and structure**
Read patterns together with their context.

05 **Strengthen psychology and discipline**
Practice patience, limits, and deliberate decisions.

06 **Review your progress**
Find the areas that need another round.

07 **Build your trading plan**
Write the rules you intend to follow.

08 **Earn your completion certificate**
Complete the required educational milestones.



The plan, prices, budgets, rules, and outcomes are constructed teaching examples, not a tested strategy or financial recommendation. Completion does not establish profitability. Use the editable-by-copying plan structure as a reference; no chapter worksheets are required.

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Your trading-plan blueprint

See the finished example first. Then build each numbered part.

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KEEP THESE REFERENCES NEARBY

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START WITH THE PLAN

What is a trading plan?

Your written guide to what you trade, how you take risk, and when you stop.

A trading plan is a set of instructions you write before the pressure of a live decision. It explains the opportunities you look for, the conditions that keep you out, the money you may risk, and how you will manage and review a trade. It is the link between what you have learned and what you actually do.

The purpose may be to earn money over time. The plan turns that purpose into choices you can control: a market you understand, a defined setup, an affordable position, clear exits, and an honest record. It cannot make every trade profitable, but it can make your decisions more deliberate and easier to evaluate.

How this guide helps	What you will do
01 **First: see a complete example**	Read the sample on pages 5-7. Its fourteen numbered sections show what a finished plan can contain.
02 **Next: understand each part**	Chapter 01 explains sample Part 01, Chapter 02 explains Part 02, and so on through Chapter 14.
03 **Then: write your own version**	Use the teaching and practical examples to choose rules for your own evaluated method, circumstances, and resources.
04 **Finally: assemble and use it**	Copy the template on pages 46-48, check it on page 49, and use Book Eight to apply it through the day.

PUT IT TO WORK The sample is a worked writing example, not a strategy recommendation. Start by seeing how its parts connect. The chapters then help you understand the choices and replace the sample answers with your own.



CANDLE CHECK • Put it into practice

Green: See the whole plan before deciding how to write each part.
Red: A sample gives you a structure, not a promise about market results.

MY TRADING PLAN

Purpose, market, and entry rules

TRADER Sample trader | **VERSION** 1.0 | **DATE** October 21, 2026

MARKET MGC | **STYLE** Intraday | **TIME ZONE** America/New_York

I will follow the decisions below before, during, and after each trade.

01 What is your why?

I am building a disciplined approach to supplemental income over time. I will keep living expenses and emergency reserves outside speculative risk. My daily job is to follow this plan and record the actual result; I will not force a trade to pay a bill.

02 Trader type and time horizon

I am an intraday trader. I will not hold overnight or leave a position unattended. I use fifteen-minute context and one-minute entry evidence. I will finish managing and verify that I am flat by my closing deadline.

03 Market and session

I trade Micro Gold futures (MGC), with the exact contract month verified before each session. My clock is America/New_York. My chosen window is 8:20-10:30 a.m.; my last-entry cutoff is 10:15 a.m. I verify current product units, schedule, costs, and broker requirements before trading.

04 Approved setups

I trade a break-and-retest continuation at a reference marked before the break. For longs, fifteen-minute structure must show two higher confirmed swing highs and lows; shorts require two lower highs and lows. I use the latest relevant swing reference. A swing requires two completed bars on either side and is known only after those bars close.

05 Entry confirmation

On one minute, price must close beyond the marked reference. The first subsequent retest must touch it and close on the breakout side. Within two more completed bars, a candle must close above the retest high for a long or below its low for a short. I evaluate one limit order at that close. I cancel after two bars, a close back across the reference, an event restriction, or the time cutoff, whichever comes first.

SAMPLE

Illustrative sample only. These strategy rules and budgets are not a tested method or a recommendation.

MY TRADING PLAN

Risk, management, and daily boundaries

TRADER Sample trader | **VERSION** 1.0 | **DATE** October 21, 2026

MARKET MGC | **STYLE** Intraday | **TIME ZONE** America/New_York

I will keep these rules consistent with the purpose and entry method on plan page one.

06 Stop placement and invalidation

For a long, my initial stop trigger is two MGC ticks below the retest low; for a short, two ticks above its high. I verify the accepted protective instruction and actual position quantity. A completed one-minute close back across the reference triggers my early exit. I never widen risk after entry. If required protection is missing, I use the rehearsed close-risk procedure and verify the result.

07 Position sizing

My maximum estimated trade risk is $75, with a one-contract cap. My effective allowance is the smallest of $75, remaining daily allowance less a $10 execution reserve, and applicable account room. I calculate unit risk from stop distance plus a $5 planning allowance for fees and adverse fills, checking actual costs before use. I round down to a whole contract. If the answer is zero, I skip. Actual loss can exceed the estimate.

08 Profit taking and management

I target the nearest premarked opposing fifteen-minute swing reference. I skip if none exists or target room is less than 1.5 times initial price risk before costs. I do not add, take partials, trail, or make a discretionary breakeven move. I keep protection active. The first applicable early-failure, protective, target, event-boundary, or time-exit condition requires action; I verify fills and remaining orders after the response.

09 Daily loss and trade limits

I stop new entries at the earliest of a $150 net-loss boundary, two losing trades, three filled entries, a material rule breach, or the time cutoff. I include actual costs and open exposure when assessing remaining risk. I will not reset these limits by switching accounts or markets. I manage any existing position under the exit rules, then verify positions and orders.

10 No-trade conditions

For a relevant scheduled event, I place no new entry from fifteen minutes before until fifteen minutes after and verify flat before the interval starts. Afterward, I reassess execution conditions and require a fresh setup. Unknown account state, stale data, abnormal execution, or inability to monitor means no new risk. A buffer ending does not guarantee suitable conditions.

SAMPLE

Illustrative sample only. These strategy rules and budgets are not a tested method or a recommendation.

MY TRADING PLAN

Routine, review, and commitment

TRADER Sample trader | **VERSION** 1.0 | **DATE** October 21, 2026

MARKET MGC | **STYLE** Intraday | **TIME ZONE** America/New_York

I will keep these rules consistent with the purpose and entry method on plan page one.

11 Emotional warning signs

Chasing, repeated clicking, and recovery urgency are my warning signs. I stop new risk, follow the existing trade rules, and verify exposure before stepping away. After each fully closed trade, I pause at least five minutes. I return only with steady attention, remaining permission, and a fresh setup. Persistent urgency or a material breach ends entries for the day.

12 Pre-trade routine

I check readiness, limits, calendar, clock, account, MGC contract, units, platform, positions, and working orders. I mark context and references before looking for the entry. Before sending, I verify the completed trigger, affordable size, stop, target room, ticket, and expiry. After sending, I verify actual status, fill quantity, protection, and remaining orders; I check status before clicking again.

13 Post-trade review

I save the original reasoning, chart evidence, planned and actual prices, quantity, fees, net result, exit reason, and rule adherence. I record one useful correction. I keep comparable losses, skips, and no-fills in the review record. I confirm the final position and working-order state instead of assuming I am flat.

14 Education and commitment

I review at the end of the trading week. I keep this plan dated and versioned and separate practice and live records. I examine net results, costs, drawdown, and adherence. I document and evaluate a proposed strategy change before adopting it, while preserving the original record. I do not change the strategy during a trade to justify exposure.

MY COMMITMENT I will use this plan to guide decisions, accept the result, and review honestly.

SAMPLE

CHAPTER 01 PLAN FOUNDATIONS

What is your why?

Purpose supports patience; it does not create a daily payment obligation.

It is okay to want trading to make money. The useful question is what you want that money to do for your life, and what you are willing to risk while developing the skill. Your plan should connect the bigger goal to sensible decisions today. That gives you something more reliable than the feeling that you need a winning trade.

• Choose your main purpose: supplemental income, eventual income replacement, capital growth, or another clearly stated goal.

• Decide which money stays outside the trading account, including household expenses and emergency savings.

• Pair the financial goal with a daily behavior you can measure, such as waiting for your setup or recording every trade.

HOW YOU MIGHT WRITE IT

I want to build a source of supplemental income over time. Today I will follow my entry and risk rules, keep essential money separate, and record the actual result. I will not force a trade to meet a personal bill.

PUT IT TO WORK Your purpose can guide what you trade, how much time you commit, and what you protect. Review it periodically; you do not need to reconsider your entire financial future before every candle.



CANDLE CHECK • Put it into practice

Green: Let the goal support patience and thoughtful decisions.
Red: A financial deadline cannot make a setup appear.

CHAPTER 01 APPLICATION

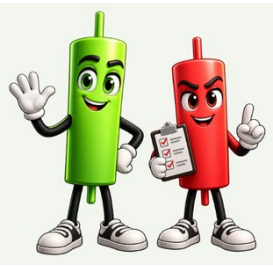
Give the goal a practical job

Connect purpose to the next practical decision.

Plan detail	What it means in practice
The bigger goal	I want trading to contribute to my income over time.
Today's focus	Wait for a setup I understand, size it correctly, and follow its exit rules.
Money boundary	Living expenses and emergency reserves stay outside speculative risk.
Financial review	Judge progress using net results, drawdowns, and consistency across many sessions.

Imagine that an unexpected bill arrives before the session. Your financial goal has not changed, but the market has not become more predictable. The plan keeps the same exposure limits. After the session, address the bill through your wider finances rather than asking the next trade to solve it.

PUT IT TO WORK Write one sentence explaining why you trade, followed by one sentence explaining what that purpose will never justify.



CANDLE CHECK • Put it into practice

Green: Let the goal support patience and thoughtful decisions.
Red: A financial deadline cannot make a setup appear.

CHAPTER 02 PLAN FOUNDATIONS

Trader type and time horizon

Match the pace to the attention you can actually provide.

Choose a trading style that fits your life before choosing the smallest chart on the screen. Fast entries demand frequent decisions. Longer holds may require patience through larger fluctuations and different event risks. Your plan should say how long you intend to stay involved and when the trade must end. That makes the commitment clear before you are emotionally attached to a position.

- Compare the attention needed for scalping, intraday trading, and holding across sessions.
- Give each chart a role: context, setup, entry, or management. Choose intervals that fit the method you have evaluated.
- State whether overnight or unattended exposure is allowed, and how you will handle it if permitted.

HOW YOU MIGHT WRITE IT

I trade within a planned intraday window and close all positions by my stated finish time. I use separate chart views for context, entry, and management. I will not turn a losing day trade into an overnight hold.

PUT IT TO WORK Compare the chosen style with an ordinary day in your calendar. The plan should fit the attention you can reliably provide, including the time needed to finish and review.



CANDLE CHECK • Put it into practice

Green: Choose a pace you can manage consistently.
Red: A losing position does not get a new holding style to avoid its exit.

CHAPTER 02 APPLICATION

Build around the time you have

Match the method to the attention you can provide.

Plan detail	What it means in practice
Scalping	Frequent monitoring; fast order decisions; costs and fills deserve close attention.
Intraday	Trades begin and end within the planned day or session. Define entry and closing cutoffs.
Swing trading	Exposure can cross sessions. Plan for gaps, events, financing, and monitoring.
Your choice	Name the style and describe the actual attention and holding commitment.

Suppose you can watch the market for ninety uninterrupted minutes but must leave afterward. An intraday plan can define a last-entry time and an earlier point for finishing longer-running trades. If a setup appears too late, you let it go. Changing its holding style after entry would create a commitment you did not prepare to manage.

PUT IT TO WORK Write your available window, latest new-entry time, and required closing time in one named time zone.



CANDLE CHECK • Put it into practice

Green: Choose a pace you can manage consistently.
Red: A losing position does not get a new holding style to avoid its exit.

CHAPTER 02 PRACTICAL APPLICATION

Choose a pace you can support

Build the routine around availability and holding risk.

Style	Attention and exposure	Plan must specify
Short intraday / scalping	Frequent decisions and close monitoring; costs matter.	Entry window, order control, pace limit and interruption procedure.
Intraday	Positions managed within a session under a closing policy.	Monitoring schedule, permitted setups and finish time.
Swing / longer holding	Fewer decisions may coexist with overnight or event exposure.	Review times, protection, holding permissions and event response.

There is no automatic stress or reward ranking here. The fit depends on the instrument, method, exposure and person. A trader with a full-time job should not adopt a method requiring uninterrupted monitoring during work.

Write the choice in Part 02: "I can monitor during [window]. I will study [horizon] using [chart roles]. If unavailable, I will [defined action]." In Part 03, name the actual market and timezone. Keep weekly preparation, daily checks and post-trade review distinct.



CANDLE CHECK • PUT IT TO WORK

Green: Availability is a design input.
Red: Copying another trader's pace does not make it workable.

CANDLE COACHES • COMIC 01

The plan needs its own desk.

Longer is not always easier to follow.



RED

“My plan now has its own mailing address!”



GREEN

“Can you find the next instruction?”



RED

“Somewhere between chapters sixteen and lunch.”



GREEN

“Keep a short desk version. Save the detail behind it.”

THE TAKEAWAY The plan should help you make the next decision.

CHAPTER 03 PLAN FOUNDATIONS

Market and session

Name the instrument, contract, clock, and boundaries.

Your plan needs to say what you will actually trade. Gold futures, a currency pair, a stock, and an option do not turn the same price movement into the same dollar exposure. Learn the product's units, costs, hours, and order behavior. Then choose a session you can prepare for and study consistently. You do not have to watch every market to build a useful plan.

- Start with a manageable watchlist and state which product you will focus on.
- Record the tradable symbol or contract, unit value, account currency, and relevant costs.
- Separate the market's full operating schedule from the smaller window in which your plan allows entries.

HOW YOU MIGHT WRITE IT

Before each session I will verify the account, tradable symbol, units, and current schedule. My plan uses a named time zone and separate cutoffs for new entries and closing exposure. If a specification is unclear, I resolve it before trading.

PUT IT TO WORK A continuous futures chart may help analysis, but an order needs the intended tradable contract. Keep the product reference close enough to check before sending.



CANDLE CHECK • Put it into practice

Green: Know the financial meaning of the movement on your chart.
Red: A familiar ticker is not enough to verify an order.

CHAPTER 03 APPLICATION

Make the units understandable

Carry the correct unit through every calculation.

Plan detail	What it means in practice
Futures	Confirm the contract month, tick size, tick value, expiry, and current schedule.
Stocks or ETFs	Confirm share quantity, relevant hours, liquidity, and trading permissions.
Forex	Confirm the pair, lot units, pip value, account-currency conversion, and rollover treatment.
Options or other products	Use product-specific exposure and exercise rules; a simple futures formula may not apply.

For one Micro Gold futures contract, the exchange specifies 10 troy ounces and a 0.10 tick worth $1. A full point is therefore $10 per contract. That specification helps you calculate risk; it does not tell you what size is suitable. For another instrument, obtain its own current units instead of copying the gold calculation. [2]

PUT IT TO WORK Keep a short product reference with your plan: units, costs, schedule source, symbol, and broker contact.



CANDLE CHECK • Put it into practice

Green: Know the financial meaning of the movement on your chart.
Red: A familiar ticker is not enough to verify an order.

CHAPTER 04 PLAN FOUNDATIONS

Approved setups

Use one definition that can survive a screenshot review.

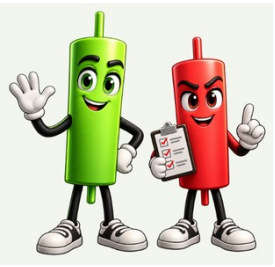
Think of an approved setup as a situation you have studied well enough to describe before its outcome. It includes the market condition, the location, the entry evidence, and the point where the idea stops making sense. Begin with a small number of methods you can recognize consistently. A long list of pattern names usually adds more decisions without explaining how to make them.

- Name each setup and describe the condition it belongs in: trend, range, or another defined environment.
- Explain how you select the area before the entry signal appears.
- Collect examples that fail or become unclear as well as those that work.

HOW YOU MIGHT WRITE IT

I will trade only the setup families listed in my plan. Each one must name its context, location, trigger, invalidation, and exclusions. A pattern I recognize but have not evaluated belongs in my study notes, not in an improvised order.

PUT IT TO WORK Save a few examples that qualify and a few that do not. Write what made the difference while the chart evidence is still easy to identify.



CANDLE CHECK • Put it into practice

Green: Start with a situation you can explain clearly.
Red: Recognition alone does not establish a profitable method.

CHAPTER 04 APPLICATION

One pattern, different locations

Compare the same pattern at different locations.

Plan detail	What it means in practice
Trend pullback	Look for a retracement within the directional structure your method defines.
Break and retest	Watch how price behaves after moving beyond a previously marked boundary.
Range-edge response	Study the response at a defined boundary, rather than treating the middle as an edge.
What makes it approved	Written recognition rules, evaluated examples, and clear limits on when it applies.

A bullish candle at a planned support area and the same candle directly beneath resistance may look alike. Their location and available target room differ. Your setup description should help you explain that difference before either trade plays out. The pattern name starts the conversation; the context decides whether it belongs in your plan.

PUT IT TO WORK Describe one setup without naming an indicator. Then add only the indicators that have a clear, evaluated role.



CANDLE CHECK • Put it into practice

Green: Start with a situation you can explain clearly.
Red: Recognition alone does not establish a profitable method.

CHAPTER 05 PLAN FOUNDATIONS

Entry confirmation

Turn “looks strong” into a completed event.

An entry rule answers a simple question: what must happen before I am allowed to place the order? Phrases such as looks strong or feels ready leave that answer to emotion. Be specific about the chart interval and the evidence you need. A candle that is still forming, a closed candle, a working order, and a filled position are four different things.

- State whether your trigger requires a touch, a completed close, or another observable event.
- Choose the order type and acceptable entry conditions before the opportunity develops.
- Give the idea an expiry so that a late signal does not become an excuse to chase.

HOW YOU MIGHT WRITE IT

For each setup, I will write the exact evidence required before entry, the order I may place, and the condition that cancels the idea. If the entry becomes late or the price no longer fits the risk plan, I will wait for a new opportunity.

PUT IT TO WORK Use a saved chart to point to the trigger, then explain when permission ends. A useful entry rule tells you both when to act and when the opportunity has passed.



CANDLE CHECK • Put it into practice

Green: Wait for the evidence you chose in advance.
Red: A move continuing without you does not authorize a late entry.

CHAPTER 05 APPLICATION

Write the difference between ready and late

Define permission, price boundaries, and expiry.

Plan detail	What it means in practice
Vague wording	I buy when the candle looks strong.
Illustrative clearer wording	After a planned support response, wait for a completed candle to close above the response candle's high.
Finish the rule	Add the chart interval, valid entry instruction, expiry, and invalidation. Evaluate the complete method.
After submitting	Check the actual fill and exposure; a chart signal does not prove an order executed.

Suppose your rule needs a completed close, but price moves quickly while the candle is still open. You wait for the evidence your rule requires. If the completed signal leaves too much distance to the valid stop, the risk check can still reject it. Confirmation gives you a candidate, not an obligation to enter.

PUT IT TO WORK Write your trigger so that you can point to the exact completed evidence on a saved chart.



CANDLE CHECK • Put it into practice

Green: Wait for the evidence you chose in advance.
Red: A move continuing without you does not authorize a late entry.

CHAPTER 05 PRACTICAL APPLICATION

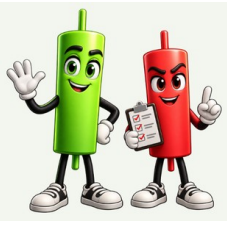
Turn vague words into plan rules

Parts 04 and 05 must describe the same setup.

Vague wording	Operational rewrite
"Trade strong breakouts."	Mark the boundary before the move; name the interval and required close beyond it.
"Wait for the retest."	Define the zone, return window, required response and expiry.
"Check volume."	If required, name the source, baseline and qualifying condition.
"Enter when ready."	State trigger, order type, maximum acceptable entry and cancellation condition.

Use the completed plan on the opening pages as a model of a usable document, not a strategy to copy without review. Every numbered part should answer its chapter's question. Your chosen method may use different parameters, but it still needs an unambiguous definition.

Cross-check Parts 05-08 together: the entry determines the distance to invalidation; that distance determines size; the nearby opposing area affects target room. If one changes, revisit the others before submitting. Record the plan version so a later review uses the rules that actually applied.



CANDLE CHECK • PUT IT TO WORK

Green: Another reader can locate the event from the written rule.
Red: "Looks right" leaves the decision unwritten.

CANDLE COACHES • COMIC 02

Wait! My entry is leaving!

An expired signal does not create an emergency.



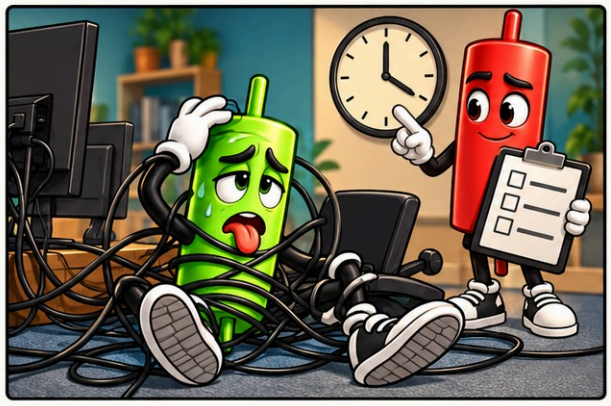
GREEN

“The move is leaving without me!”



RED

“Does the entry still fit your rule?”



GREEN

“Apparently running is not confirmation.”



RED

“Let it go. Wait for a fresh opportunity.”

THE TAKEAWAY A missed move does not require a late trade.

CHAPTER 06 PLAN FOUNDATIONS

Stop placement and invalidation

Define the thesis boundary before choosing quantity.

Start by asking where the trade idea would be wrong. That is the invalidation decision. Next decide how the position will be closed if that condition occurs. The protective order is part of that response, but its trigger is not a promise of the final fill price. Your stop should reflect the method and the market structure, rather than the amount of size you would like to trade.

- Name the structure or condition that ends the idea, including any completed-candle requirement.
- Explain the protective order, buffer, and any earlier exit condition.
- Learn how your broker handles stops, price protections, and rejected or partly filled exits. [3]

HOW YOU MIGHT WRITE IT

I will choose invalidation before quantity. I will keep required protection active and never move it farther away merely to avoid a loss. If the valid stop makes the minimum unit too expensive, I will skip the trade.

PUT IT TO WORK Keep the entry, valid stop, and quantity calculation together. That makes it easier to see how a change in distance affects the exposure you can afford.



CANDLE CHECK • Put it into practice

Green: A clear boundary makes the risk calculation possible.
Red: A stop trigger cannot guarantee the maximum realized loss.

CHAPTER 06 APPLICATION

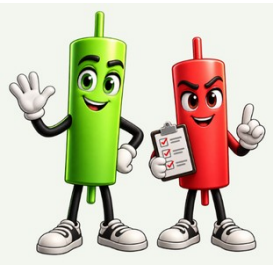
Give the trade room for the right reason

Separate structural failure from discomfort.

Plan detail	What it means in practice
The idea	A support-based long depends on the planned support response remaining valid.
The boundary	Define which price or observation disproves that response.
The protective instruction	Choose and verify the supported order that implements the planned response.
If execution differs	Manage the real remaining position and follow the rehearsed contingency procedure.

A wider stop can sometimes reflect a different valid structure, but that choice must come from the method before entry. It changes the sizing calculation. Widening an existing stop because you dislike the loss is a different decision: it adds risk without fresh permission. Keep those two situations separate in the plan.

PUT IT TO WORK Explain why the stop belongs there and what you will do if protection is missing or fails to complete.



CANDLE CHECK • Put it into practice

Green: A clear boundary makes the risk calculation possible.
Red: A stop trigger cannot guarantee the maximum realized loss.

CHAPTER 07 PLAN FOUNDATIONS

Position sizing

Let the distance and all active budgets determine quantity.

Position sizing connects the trade idea to your money. First find the valid stop distance, then translate that distance into a loss estimate for one unit. Include costs and a sensible allowance for execution differences. Compare the estimate with the amount still available under your limits. The result may be a smaller position than you hoped, or no position at all. [4]

- Use the product's actual tick, pip, point, or share value, with any necessary currency conversion.
- Compare the proposed risk with the trade limit, remaining daily allowance, other exposure, and account restrictions.
- Round down to a permitted unit and apply any stricter size cap. Margin is not the same as your risk budget.

HOW YOU MIGHT WRITE IT

I will calculate quantity from the valid stop distance, unit value, costs, and the smallest remaining allowance. If the minimum unit does not fit, I will not force the trade by moving its stop. I will leave room for execution uncertainty.

PUT IT TO WORK The simple fixed-value formula fits products with a known value per unit of price movement. Currency conversion, options, and other nonlinear exposure need their own correct calculations.



CANDLE CHECK • Put it into practice

Green: Calculate size after the trade geometry is clear.
Red: Buying power does not tell you what loss is affordable.

CHAPTER 07 APPLICATION

Let zero be an acceptable answer

Skip when the minimum quantity exceeds the allowance.

Plan detail	What it means in practice
Teaching inputs	MGC entry 2500.0; stop trigger 2494.0; 6.0-point distance.
One-contract price risk	6.0 points × $10 per point = $60.
Estimated total	Add an invented $5 fee/adverse-fill allowance: $65 per contract.
Quantity example	A $75 effective allowance permits at most floor($75 ÷ $65) = 1 contract.
When the answer changes	If only $60 remains, the same estimate permits zero contracts.

With an 8-point valid stop, one MGC has $80 of price risk before the invented $5 allowance. The $85 estimate does not fit a $75 budget. That is useful information, not a failed calculation. Keep the valid stop, reduce size if a separately permitted smaller unit exists, or skip. Actual losses may still exceed the estimate.

PUT IT TO WORK Keep the calculation visible beside the entry, stop, and target. Recalculate if those inputs change.



CANDLE CHECK • Put it into practice

Green: Calculate size after the trade geometry is clear.
Red: Buying power does not tell you what loss is affordable.

CANDLE COACHES • COMIC 03

The basket did not get smaller.

Quantity follows the actual risk calculation.



GREEN

“The margin is small. I can carry all of these!”



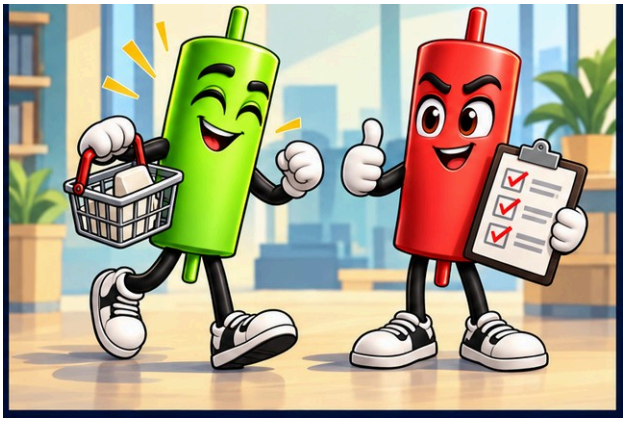
RED

“What would the stop cost for that size?”



GREEN

“My calculator would like us to sit down.”



RED

“Distance, unit value, costs, and limits. Then quantity.”

THE TAKEAWAY Margin and affordable trade risk answer different questions.

CHAPTER 08 PLAN FOUNDATIONS

Profit taking and management

Write exit permissions before the result starts talking.

Once money is moving, it is easy to invent reasons to hold longer or close sooner. Decide beforehand how the trade will be managed. Will you use a fixed target, a structural exit, a planned trail, or another evaluated approach? Each choice has tradeoffs. Your plan should let you recognize the next action without making a new strategy while exposed.

- Identify the next opposing area and the realistic room from entry to that reference.
- State when a stop may move, whether additions or partial exits are allowed, and which chart guides management.
- Define how target, invalidation, time, and emergency exits interact.

HOW YOU MIGHT WRITE IT

Before entry, I will name the initial objective and the conditions that require me to hold, reduce, or exit. I will not widen risk or add size without explicit permission. I will keep required protection active while following the management rule.

PUT IT TO WORK Choose the management approach before the session and describe it in one place. If you allow more than one exit condition, explain which action takes priority.



CANDLE CHECK • Put it into practice

Green: The management method should fit the size you actually hold.
Red: An attractive reward ratio does not tell you the probability of winning.

CHAPTER 08 APPLICATION

Make the management match the position

Use only management actions the position supports.

Plan detail	What it means in practice
Fixed objective	A planned reference supplies the exit area; it still needs sufficient room after costs.
Structural exit	A defined change in structure supplies the response; specify what counts as confirmed.
Trailing method	State the reference and update rule. Moving to entry is a choice to evaluate, not an automatic improvement.
Partials and additions	Use only quantities the product allows and calculate the remaining or added exposure.

If you hold one futures contract, you cannot close half a contract. A scale-out plan needs enough permitted units to execute it, while staying within the same risk limits. With one contract, choose a full-position management method. Avoid writing attractive rules that the actual position cannot perform.

PUT IT TO WORK Write the first profitable exit, the losing exit, and the time exit. Then state what controls if they overlap.



CANDLE CHECK • Put it into practice

Green: The management method should fit the size you actually hold.
Red: An attractive reward ratio does not tell you the probability of winning.

CHAPTER 09 PLAN FOUNDATIONS

Daily loss and trade limits

Stop before another entry exceeds the remaining allowance.

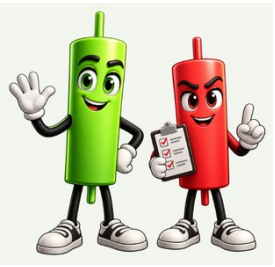
A daily limit protects the session as a whole. It helps you avoid making a string of individually plausible decisions that together risk too much. Decide how you measure the day's result, whether costs and open losses are included, and what stops further entries. If you trade under separate account rules, your own boundaries must fit within those rules.

- Define a per-trade allowance and a daily boundary using clear dollar or equity measures.
- Include open exposure and related positions when assessing what remains available.
- Choose any trade-count, loss-count, time, or material-error stop before the session starts.

HOW YOU MIGHT WRITE IT

Before every new entry I will compare its estimated risk with the remaining daily allowance and other exposure. I will stop at the first applicable boundary. I will not reset the limit by changing instruments or accounts.

PUT IT TO WORK If a broker or account provider measures loss differently from your personal plan, track both. The stricter applicable boundary controls the next commitment.



CANDLE CHECK • Put it into practice

Green: Check the next commitment, not only the loss already recorded.
Red: Another account is not a fresh daily risk allowance.

CHAPTER 09 APPLICATION

A limit is a boundary, not a balance to spend

Check the remaining room before adding exposure.

Plan detail	What it means in practice
Illustrative daily boundary	$150 net-loss boundary, with costs included and an execution cushion retained.
Current result	The day is down $100 and there are no other open positions.
Next candidate	The proposed trade has a $65 estimated loss.
Decision	The remaining $50 is insufficient even before a cushion; skip the entry.
Other stopping rules	A time cutoff or material error can finish the session before the dollar boundary.

Being below a daily loss limit is not enough. You also need room for the next trade and for execution differences. If your account has a trailing or equity-based drawdown rule, calculate that separately using its current terms. Do not substitute the account's advertised size for the actual remaining loss allowance.

PUT IT TO WORK Write your loss measure, reserve policy, and the exact action when a session boundary is reached.



CANDLE CHECK • Put it into practice

Green: Check the next commitment, not only the loss already recorded.
Red: Another account is not a fresh daily risk allowance.

CHAPTER 09 PRACTICAL APPLICATION

Make the risk sections agree

Parts 06-09 work as one calculation.

Suppose a hypothetical account allows $100 planned risk per trade and $150 of session losses. After $70 net realized loss, only $80 remains under this simple personal cap. If estimated risk is $46 per contract, one contract fits; two do not.

Plan part	Consistency check
06: Invalidation	The stop follows the method's failure boundary; it is not moved merely to fit size.
07: Position sizing	Convert the distance and unit value into money, allow for costs, round down.
08: Management	Any permitted modification must remain inside the risk policy.
09: Daily limits	Count losses, open commitments and other restrictions exactly as defined.

A stricter external floor, personal reserve or correlated position may reduce the allowance further. The illustration is an estimate, not a guarantee on loss or a recommended budget.

Write the zero-size result explicitly: "When the smallest permitted unit does not fit, I do not enter." This makes the plan executable even when the chart looks attractive.



CANDLE CHECK • PUT IT TO WORK

Green: The tightest active limit controls the next decision.
Red: An approved setup cannot override the risk section.

CHAPTER 10 PLAN FOUNDATIONS

No-trade conditions

A complete plan includes a clear decision to remain out.

Your plan is also a guide to when you should leave the order ticket alone. Some restrictions are temporary, such as a scheduled release. Others, such as unreliable data or an inability to monitor the position, may end the session. Writing these conditions gives you a clear answer when a tempting pattern appears at the wrong time.

- Check relevant events in the same time zone as your chart and plan.
- Define your policy for new orders and existing positions around important releases.
- Include unclear product values, unresolved orders, abnormal execution conditions, fatigue, and missing attention.

HOW YOU MIGHT WRITE IT

I will stay out when a required preparation check fails or a restriction is active. For a temporary restriction, I will state what must improve before I reconsider. For a session-ending problem, I will stop new entries and verify the account.

PUT IT TO WORK Separate wait for now from finished for today. A clear return condition prevents you from declaring the restriction over simply because you want another trade.



CANDLE CHECK • Put it into practice

Green: Waiting can be a complete and useful decision.
Red: A timer expiring does not repair the setup or the market conditions.

CHAPTER 10 APPLICATION

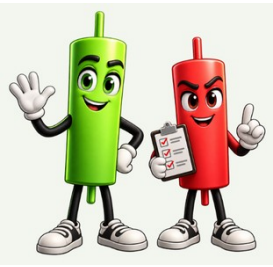
Know what would let you return

State what must change before permission returns.

Plan detail	What it means in practice
Scheduled event	Write the restriction interval and how any open position will be handled.
After the event	Recheck spread, liquidity, data, structure, and setup; elapsed time alone is insufficient.
Technical uncertainty	Resolve the actual account and order state before adding exposure.
Personal restriction	If you cannot attend to the trade or follow the rules, do not open it.

Suppose your plan uses a fifteen-minute buffer after a relevant release. When that time ends, quotes are still erratic and the old setup has broken. The timer has cleared one restriction, but the market has not supplied a new opportunity. A buffer is a chosen policy to evaluate; no fixed number of minutes guarantees suitable conditions.

PUT IT TO WORK For each restriction, finish the sentence: I can reconsider only when... Some conditions should end the day entirely.



CANDLE CHECK • Put it into practice

Green: Waiting can be a complete and useful decision.
Red: A timer expiring does not repair the setup or the market conditions.

CANDLE COACHES • COMIC 04

The mouse has an opinion.

The session limit has the final word.



RED

“My hand says there is time for one more.”



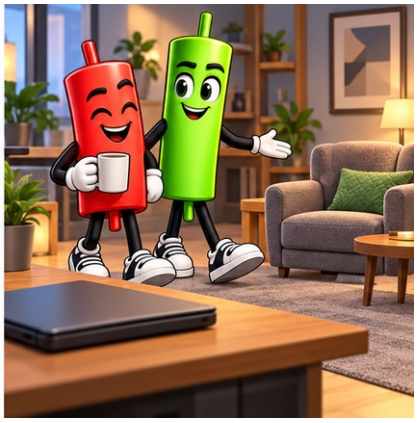
GREEN

“What does your stopping rule say?”



RED

“The mouse would like to appeal.”



GREEN

“Finish the account checks. Review the appeal later.”

THE TAKEAWAY A stopping rule is most useful when you want to ignore it.

CHAPTER 11 PLAN FOUNDATIONS

Emotional warning signs

Name the behavior before it changes the order.

You do not have to feel perfectly calm to follow a plan. You do need to recognize when emotion starts changing your behavior. Notice the practical signs: rushing the ticket, bargaining with the stop, watching the result instead of the chart, or wanting an immediate recovery. Those signs can trigger a prepared response before they become a larger loss.

- Name the behaviors you personally notice when pressure rises.
- Choose a pause procedure that begins with verifying and controlling any open exposure.
- Define when you may return and which behavior or rule breach ends the session.

HOW YOU MIGHT WRITE IT

If I notice chasing, repeated clicking, or a need to recover immediately, I will stop opening new risk. I will follow the existing trade's rules, verify positions and orders, then pause. If the urge persists or a material breach occurs, I will finish the session.

PUT IT TO WORK A pause starts after the position and order state are understood and controlled. Walking away from unexplained exposure is not the reset your plan is trying to create.



CANDLE CHECK • Put it into practice

Green: Use the warning sign to slow the next decision.
Red: Confidence does not increase the authorized risk.

CHAPTER 11 APPLICATION

Confidence needs boundaries too

Keep the same boundaries after a win.

Plan detail	What it means in practice
After a loss	Watch for urgency, larger size, or entering before fresh evidence.
After a win	Watch for overconfidence, loosened standards, or an unplanned size increase.
During a pullback	Compare price with the rule rather than changing protection for comfort.
Before returning	Check attention, remaining limits, time, and a fresh qualified setup.

A good trade closes with a profit and you feel ready to double the next position. That feeling does not change the sizing policy. Take the same pause and evaluate the next candidate independently. Emotional discipline matters after favorable outcomes just as much as after losses.

PUT IT TO WORK Write your first warning sign and the action you want it to trigger. Keep that sentence where you can see it.



CANDLE CHECK • Put it into practice

Green: Use the warning sign to slow the next decision.
Red: Confidence does not increase the authorized risk.

CHAPTER 12 PLAN FOUNDATIONS

Pre-trade routine

Make readiness visible before the ticket opens.

A good routine is short enough to use and complete enough to catch important errors. You are not trying to repeat the whole textbook every morning. You are checking the conditions that can change today's decisions: your readiness, current events, account state, chart context, and the trade you are considering. Put the checks in a sequence you can follow without rushing.

- Begin with readiness and limits, then check the calendar and session.
- Verify the account, instrument, data, positions, and working orders before relying on the chart.
- Before sending, repeat the setup, risk, quantity, ticket, and protection checks.

HOW YOU MIGHT WRITE IT

I will prepare before opening risk: review my limits, check relevant events, verify the account and tools, and map the chart. Before each order I will confirm the completed trigger, invalidation, target room, quantity, and ticket. After sending I will verify the response.

PUT IT TO WORK Keep the start-of-day checks and the before-send checks distinct. Some facts need one morning review; the actual ticket and trade risk need another look before every commitment.



CANDLE CHECK • Put it into practice

Green: A routine supports the next decision without adding clutter.
Red: Chart preparation does not replace account and order checks.

CHAPTER 12 APPLICATION

Catch the saved-ticket mistake

Read the saved ticket before trusting its settings.

Plan detail	What it means in practice
Start of session	Readiness, limits, clock, relevant events, correct account, and existing exposure.
Chart preparation	Condition, meaningful levels, possible scenarios, and invalidation.
Immediately before send	Fresh entry evidence, affordable size, intended order, exits, and expiry.
Immediately after send	Actual status, fill quantity, protection, and any required correction.

Yesterday's order template may still contain an old quantity or contract. Today's chart can be perfectly marked while the ticket is wrong. Read the final ticket rather than trusting the template. If the response is delayed after submitting, check status before clicking again; a second click can create another order.

PUT IT TO WORK Use Book Eight's daily sequence as the operating guide, and keep your own limits and setup rules beside it.



CANDLE CHECK • Put it into practice

Green: A routine supports the next decision without adding clutter.
Red: Chart preparation does not replace account and order checks.

CHAPTER 12 PRACTICAL APPLICATION

Separate wait, skip, and finish

Part 10 should tell you whether permission can return.

State	Example	Return condition
WAIT	Price has not reached the location or the trigger is unfinished.	The required event completes before expiry; all other checks still pass.
SKIP THIS SETUP	Entry expired, target room disappeared, or the setup failed.	A new independently qualifying setup, if the plan permits it.
FINISH THE SESSION	Daily limit, cutoff, unresolved execution issue or readiness stop.	The plan's next authorized session or formal reset procedure.

Use Part 11 to connect emotional cues to the same actions. Boredom might call for waiting or finishing the observation window; an urge to recover losses does not create a new setup.

Part 12 is the pre-trade routine: account and instrument, calendar and clock, condition and location, setup and expiry, risk and size, order fields and protection. Do not repeat the full checklist inside every section. Keep one authoritative version and refer back to it.



CANDLE CHECK • PUT IT TO WORK

Green: I know what would permit a return.
Red: "No trade" without a reason can become an arbitrary exception.

CHAPTER 13 PLAN FOUNDATIONS

Post-trade review

Record what you knew, what you did, and what happened.

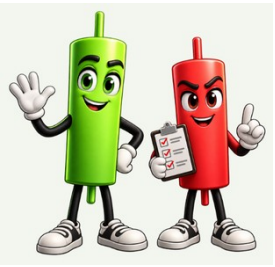
Your journal should help you improve, not simply preserve a screenshot of a winning trade. Record the idea as it existed before the result, the actions you actually took, and what the account shows afterward. This lets you distinguish a weak setup, an execution problem, and a behavior problem. Each may need a different correction.

- Save planned prices, actual fills, quantity, costs, and the reason for exit.
- Record whether the required rules were followed, including any change you made while exposed.
- Keep comparable losing trades, skipped candidates, and no-fill decisions in the review sample.

HOW YOU MIGHT WRITE IT

After each trade I will record the original reasoning, planned and actual numbers, costs, exit, and adherence. I will choose one practical correction when needed. At the scheduled review, I will examine both net performance and the quality of my decisions.

PUT IT TO WORK Include both money and behavior in the review. A profitable method can be executed poorly, and disciplined execution can still reveal a method that needs more work.



CANDLE CHECK • Put it into practice

Green: Record the outcome and the decision quality separately.
Red: One profitable trade cannot validate the plan.

CHAPTER 13 APPLICATION

Review a loss and a win honestly

Grade execution separately from the financial result.

Plan detail	What it means in practice
Preparation and entry	What was known at the time, and why did the setup qualify?
Execution and management	What filled, what changed, and did the actions match the plan?
Money result	Gross and net outcome, with actual costs and a consistent measurement convention.
Next improvement	One specific change to study or one behavior to correct.

A trade can lose money even when you followed the plan. Keep it in the method's results. A trade can also make money after a rule breach. Keep the gain in the financial record and the breach in the behavior record. Separating the two helps you learn without pretending that profit excuses the decision.

PUT IT TO WORK Ask two questions: is the method producing acceptable results over time, and am I executing it as written?



CANDLE CHECK • Put it into practice

Green: Record the outcome and the decision quality separately.
Red: One profitable trade cannot validate the plan.

CHAPTER 14 PLAN FOUNDATIONS

Education and commitment

Keep rules stable during the test; revise with evidence.

A trading plan is a working document. It should improve as you learn, but constant changes make it difficult to tell what actually helped. Give the plan a version and a review date. Keep the original records, make deliberate revisions outside the session, and evaluate the revised rules before depending on them with more money.

- Study unfamiliar mechanics and rehearse order handling before relying on them under pressure.
- Review comparable results, costs, drawdown, and adherence rather than selecting only the best examples.
- When changing a rule, record the old wording, the new wording, and the evidence behind the change.

HOW YOU MIGHT WRITE IT

I will keep a dated version of my plan and review it at a scheduled time. I will correct operational errors promptly, but I will not rewrite a strategy mid-trade to justify exposure. A proposed strategy change gets its own record and evaluation before adoption.

PUT IT TO WORK Use a new version when a strategy rule changes, and preserve the earlier record. This gives you an honest basis for comparing the choices over time.



CANDLE CHECK • Put it into practice

Green: Commit to honest evaluation as well as disciplined execution.
Red: Finishing the series is not proof of profitability or readiness for more risk.

CHAPTER 14 APPLICATION

Improve one thing you can explain

Make one documented correction and review it.

Plan detail	What it means in practice
Keep the original	Save the plan version and complete decision records.
Review the evidence	Look for repeated behavior, execution, or method problems.
Change deliberately	State what changes and what evidence would support or reject it.
Continue learning	Use the relevant earlier volume and controlled practice to resolve a specific gap.

After a difficult week, changing the indicator, chart interval, entry, stop, and target together may feel productive. It also hides which change mattered. Start with a clearly identified problem. Make a deliberate revision and compare a new, labeled sample while recognizing that different market conditions can also affect results.

PUT IT TO WORK Choose a review schedule and decide what evidence would make you pause, revise, or retire a method.



CANDLE CHECK • Put it into practice

Green: Commit to honest evaluation as well as disciplined execution.
Red: Finishing the series is not proof of profitability or readiness for more risk.

CHAPTER 14 PRACTICAL APPLICATION

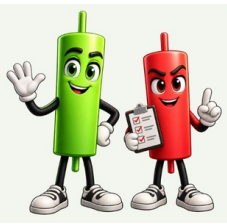
Keep the plan usable as it evolves

Parts 13 and 14 turn observations into controlled revisions.

After a session, preserve the plan version, chart before entry, intended rules, actual fills, costs and decisions. Record whether the setup qualified and whether you executed it as written. These are different review questions.

Revision record	Completed illustration
Observed issue	Two entries occurred after the planned window expired.
Proposed correction	Place a visible expiry time next to the setup and cancel the unfilled order at expiry.
What stays stable	Setup definition, risk budget and exit policy.
Practice check	Rehearse the cancellation and verify order state.
Review condition	Inspect the next defined block of qualifying opportunities for adherence.

Do not change an entry threshold because one missed trade later won. Separate a clarity correction from a strategy change. If the actual method changes, version it and collect fresh evidence. A plan is complete enough to use when its instructions answer the next decision without guesswork, including when to remain out.



CANDLE CHECK • PUT IT TO WORK

Green: A revision has a reason, version and review.
Red: Editing after each outcome destroys a consistent test.

CANDLE COACHES • COMIC 05

Flat needs two checks.

Positions and working orders both deserve a look.



GREEN

“Position zero. Laptop closed!”



RED

“Did the working orders get the message?”



GREEN

“My plan says the session has a second ending.”



RED

“Verify both. Then enjoy being finished.”

THE TAKEAWAY The final account state is part of the trading process.

REUSABLE PLAN TEMPLATE • 1 OF 3

Purpose and permission

Use the questions to write your own clear, usable rules.

Copy these headings into a document and answer in ordinary language. A useful answer tells you what to do when the situation appears. Replace general promises with the evidence and action you actually intend to use.

Part of my plan	What I need to write
01 • My purpose	What do I want trading to contribute to my life? Add one daily process focus and name the money I will keep outside speculative risk.
02 • My style	How much attention can I provide? State holding style, chart roles, maximum duration, and overnight policy.
03 • My market and window	Which account and product will I use? State units, clock, entry window, last-entry time, closing time, and schedule source.
04 • My setups	Which specific situations have I evaluated? Describe context, location, and the evidence that makes each one worth watching.
05 • My entry	What completed event permits the order? State the order type, acceptable price conditions, expiry, and reasons to cancel.

PUT IT TO WORK Read your answer against a saved example. If it leaves you guessing, add the missing detail. When the rule is clear, keep it short enough to find during the session.



CANDLE CHECK • Put it into practice

Green: Write for the person who will need this under pressure: you.
Red: Copying the structure does not make an example rule suitable for your account.

REUSABLE PLAN TEMPLATE • 2 OF 3

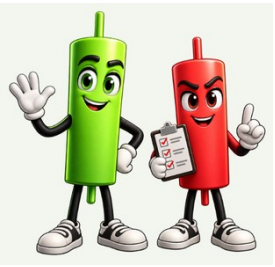
Risk and boundaries

Use the questions to write your own clear, usable rules.

Copy these headings into a document and answer in ordinary language. A useful answer tells you what to do when the situation appears. Replace general promises with the evidence and action you actually intend to use.

Part of my plan	What I need to write
06 • My invalidation	Where is the idea wrong? State the protective instruction, any buffer, early exit, and the response if protection is missing.
07 • My position size	What is my trade allowance? Explain the unit-risk calculation, costs, reserve, remaining session allowance, aggregate exposure, and size cap.
08 • My management	Where can I take profit, and what makes me hold or exit? Define trailing, partials, additions, time exit, and exit priority.
09 • My daily limits	How do I measure the day's loss and open risk? Name the monetary, count, time, and material-error stopping rules.
10 • My no-trade conditions	Which events, market problems, account uncertainties, or personal conditions keep me out? Say what permits a return or ends the day.

PUT IT TO WORK Read your answer against a saved example. If it leaves you guessing, add the missing detail. When the rule is clear, keep it short enough to find during the session.



CANDLE CHECK • Put it into practice

Green: Write for the person who will need this under pressure: you.
Red: Copying the structure does not make an example rule suitable for your account.

REUSABLE PLAN TEMPLATE • 3 OF 3

Routine and review

Use the questions to write your own clear, usable rules.

Copy these headings into a document and answer in ordinary language. A useful answer tells you what to do when the situation appears. Replace general promises with the evidence and action you actually intend to use.

Part of my plan	What I need to write
11 • My warning signs	What do I do when I rush, chase, bargain, or want a recovery? State how I control exposure before pausing and when I may return.
12 • My preparation	What will I verify before chart analysis, before sending an order, and immediately after the response?
13 • My review	Which screenshots and account details will I save? Record actual costs, adherence, result, and one useful correction.
14 • My development	When will I review the plan? Explain how changes are documented and evaluated before adoption.
Plan identity	Add my name, plan title, version, date, account mode, and next review date. Keep the full plan and desk summary on the same version.

PUT IT TO WORK Read your answer against a saved example. If it leaves you guessing, add the missing detail. When the rule is clear, keep it short enough to find during the session.



CANDLE CHECK • Put it into practice

Green: Write for the person who will need this under pressure: you.
Red: Copying the structure does not make an example rule suitable for your account.

FINAL PLAN CHECKLIST

Can the plan run without guessing?

Read it against a real decision before treating it as finished.

Set the plan beside a chart and walk through the decisions slowly. The test is whether you can explain the next permitted action without inventing a rule. Resolve unclear wording and contradictions before relying on it under pressure.

Ask yourself	What a useful answer includes
Do I know my purpose and scope?	Protected funds, product, account, clock, holding style, and entry window.
Can I recognize the setup?	Context, location, completed trigger, invalidation, expiry, and reasons to skip.
Can I calculate the size?	Current units, valid stop, costs, remaining allowance, reserve, and cap.
Can I manage either outcome?	Profitable exit, losing exit, time exit, and the order behavior that implements them.
Can I handle a problem?	A rehearsed response to rejection, partial fill, missing protection, or loss of connection.
Can I recognize when to stop?	Daily, time, attention, and material-error boundaries.
Can I learn from the result?	A journal convention, review schedule, and documented change process.

PUT IT TO WORK Keep the full plan and short desk summary consistent. Then use Book Eight to walk through preparation, chart analysis, trade checks, execution, management, and review.



CANDLE CHECK • Put it into practice

Green: A clear plan makes decisions easier to explain and review.
Red: Clarity alone does not prove profitability or suitability for live risk.

OFFICIAL REFERENCES

Verify the mechanics at the source

Use current product and broker information with the rules you write.

[1] CME Group • Building a Trade Plan

Further education on objectives, methodology, risk, strategies, and keeping a trade log.

[2] CME Group • Micro Gold Contract Specifications

Current product specifications behind the MGC unit and tick-value arithmetic.

[3] CME Group • Futures Order Types

Order behavior, including stop with protection. Confirm how the exact broker and platform implement it.

[4] CME Group • Proper Position Size

The connection between stop placement, risk allowance, and quantity.

HOW TO USE THE EXAMPLES

Sources reviewed October 21, 2026. The teaching copy, sample wording, template, budgets, chosen session windows, and completed strategy example are Before the Trade educational material. The sample strategy has not been validated as profitable. Product specifications can change; current broker handling, costs, schedules, account restrictions, and emergency procedures must be checked at the time of use.

Your plan should reflect a method you have evaluated and resources you can afford to risk. Practice, replay, and live records describe different conditions and should be identified separately. Neither finishing the guide nor receiving an educational certificate establishes profitability or suitability for greater exposure.

REFERENCE + PRACTICAL APPLICATION

Sources for the expanded lessons

Read alongside the official references already included in this volume.

These sources support product units, order behavior and measurement definitions. The setup parameters, budgets, tables and sequences are original constructed teaching examples, not historical trade records or validated strategies.

CME Group: Micro Gold contract units

CME Group: futures margin

Investor.gov: stop and stop-limit orders

Product and platform mechanics were checked October 22, 2026. Existing reference pages retain their stated review dates. Verify current account rules, provider controls and data feeds before use. Regional session conventions and dated conversions are explained with source links in Volume One.



CANDLE CHECK • PUT IT TO WORK

Green: Verify the mechanics at the source.
Red: An illustration explains a process; it does not prove future returns.

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YOU ARE HERE • WRITE YOUR PLAN

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Write the rule. Apply it and review the result.

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Review the decision.”

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