



# TRADER BLUEPRINT

*A roadmap to help new and growing traders find their way.*

1. **Create an Account**
  - a. Consider your options
  - b. Open an account
2. **Get Comfortable**
  - a. Understand your trading platform/brokerage
  - b. Understand basic trading terminology
  - c. Explore the Discord platform
3. **What is Options Trading?**
  - a. Options Explained
4. **Basic Education**
  - a. Market analysis
  - b. Risk management
  - c. Trading psychology
5. **Create and Test Your Blueprint** (*Downloadable Content*)
  - a. Use basic education to make a blueprint
  - b. Test the blueprint and record/review the results
6. **Feedback and Change** (*Downloadable Content*)
  - a. Focus on what went wrong and right
  - b. Take results and new info to optimize the blueprint
  - c. Create a system for future changes
  - d. Change is inevitable
7. **Become a Trader**
  - a. The risk is on
  - b. Reflection & sustainability

\*Every trader is different. Consider which step you're currently on and go from there.

# 1. Create An Account /

In order to trade, we need to open an account with an online broker or trading platform. There are many to choose from, so we tested and traded all of them to generate a reliable review. There are dozens of other platforms, but these are some of the most well-known. Consider your options and choose which may suit you best.

Grades are from 1 (worst) to 10 (best). Use the chart below to compare and contrast. Click the names of platforms to be sent to their website.

Platform ☒	<a href="#">Robinhood</a>	<a href="#">ThinkorSwim</a>	<a href="#">WeBull</a>	<a href="#">E-Trade</a>	<a href="#">TastyWorks</a>
Ease-Of-Use	9	5	7	6	6
Tools & Charting	5	8	7	6	7
Education	4	7	5	5	4
Help Service	5	9	7	8	7
<b>Total</b>	<b>23</b>	<b>29</b>	<b>26</b>	<b>25</b>	<b>24</b>

## / Additional notes

- Paper trading is a great way to get used to a platform and practice. Double-check if the platform you like offers it.
- Don't be afraid to test multiple platforms; find what you like.
- A cash account is what we suggest because trading with margin is high-risk since you're trading with borrowed funds.
- Most platforms will require you to request/unlock Level 2 or Level 3 trading. This unlocks the ability to trade 'naked/uncovered' options.

## 2. Get Comfortable /

### / Understand your trading platform or brokerage

- After making an account, you'll want to understand the different parts of your platform. Simple things like where to see charts, how to buy and sell positions, etc., are necessities. Understanding how to navigate the platform will save you a lot of time and stress. Figure out what the buttons do before you trade; simple.

### / Explore the Discord

- Our Discord platform offers 100+ features, from trade alerts to analysis to individual workshops and education. We create value for any type of trader. Take a few minutes to scroll through the channels.
- Can't find what you need? ([Click here](#))

### / Learn about market vocabulary

- Our website offers a vocab cheat sheet so anyone can understand the terminology that traders use on a daily basis.
- Visit our site and click "Learn More" under **Vocabulary**. ([Click here](#))

### 3. What is Options Trading? /

Options trading is the act of trading options contracts. An options contract is an agreement that allows the owner to buy or sell a stock at a specific price in the future. The keyword is 'option.' Using an options contract to buy or sell a stock is done by exercising the contract.

The previous definition may have sounded confusing. However, the act of exercising a contract is not relevant to the act of trading options. As options traders, we do not exercise contracts. Instead, we buy options contracts with the goal of selling them for a higher price. This is the same logic as purchasing a stock or a collectible; we are buying something, and our goal is to sell it for more to generate a profit.

#### / Calls (call options)

- By purchasing a **call**, the trader speculates that the stock will go higher. This is a bullish bet.

#### / Puts (put options)

- By purchasing a **put**, the trader speculates that the stock will go lower. This is a bearish bet.

Although options trading is a bit more complex than buying and selling a stock, we trade options because of the lower amount of capital required, greater potential profits, and unlimited flexibility of trading how you want to. The pros outweigh the cons.

Options trading has a variety of other variables that we will learn about. Such as building a strategy, finding opportunities, selecting trades, entering/exiting trades, and more.

## 4. Basic Education /

The amount of information on trading and investing is endless. But there are basics that we should all be aware of. We break these down into three core subjects... **Market Analysis**, **Risk Management**, and **Trading Psychology**. Our Premium platform offers dozens of workshops that cover all levels of these three subjects, from beginner to advanced.

### / Market analysis

- A trader must be able to identify trade setups and find opportunities in the market. To do this, the trader needs to know what to look for. When we learn how to analyze, we know what to look for.
- Although there are different types, technical analysis is the most common form of market analysis. It involves using price action, market structure, and technical indicators to analyze a chart.

### / Risk management

- Effective risk management involves identifying and measuring the potential risks associated with each trade and taking steps to mitigate those risks through techniques such as your risk/reward ratio per trade, position sizing, and stop-loss orders.
- It also involves developing a risk management plan that outlines how much capital to allocate to each trade and what steps to take in the event of significant losses. Understanding what to do in a winning or losing position is a key part of managing risk and being a trader.

### / Trading psychology

- Having strong analytical skills is certainly an advantage in trading, but it's important to remember that successful trading also requires a solid understanding of trading psychology. In fact, even the most skilled

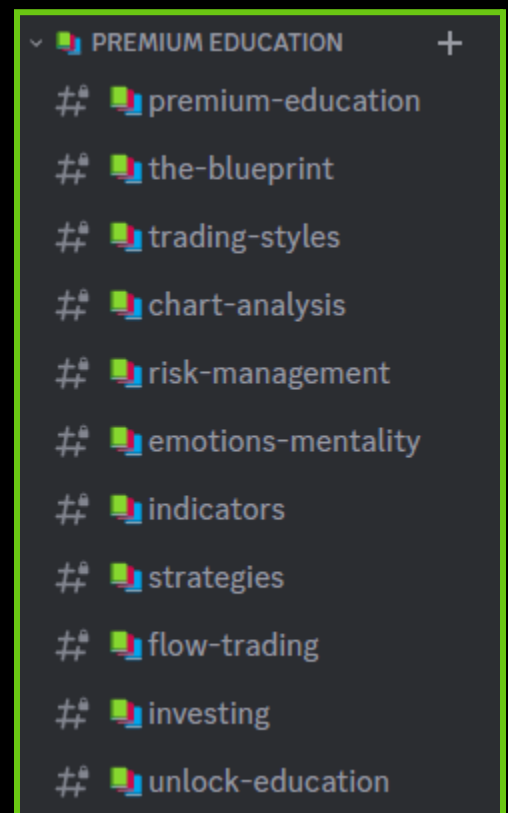
analysts can struggle as traders if they don't have their emotions and mindset under control.

- Traders who let fear, greed, or other emotions influence their decision-making process may end up making impulsive or irrational trades, which can lead to significant losses. By contrast, traders who can maintain discipline, manage their emotions, and stick to a well-defined trading plan are more likely to succeed over the long term. Therefore, mastering trading psychology and your emotions while trading is just as important as mastering market analysis and risk management in order to become a successful trader.

### **/ Educational resources**

The image to the right displays the numerous learning channels we offer our Premium members. Within each channel is a care package of individual workshops related to that topic. New workshops are always being uploaded.

\*To unlock all of this information for **free**, visit our website. ([Click here](#))



## 5. Create and Test Your Blueprint /

A trader must have a strategy to successfully and consistently trade. Forming our strategy may take some time; everyone finds their edge at their own speed. However, we can create a foundation to kickstart our strategy. This is what we call The Blueprint.

### / Use basic information to make a Blueprint

- After learning the basic information, you should have an idea of your “why”, “what”, and “how”. For starters... “Why do you want to trade and what is your goal?”. Diving deeper into that question will help immensely with trading psychology and what you want/expect from trading.
- The other part is... “How am I going to accomplish this?”. This includes chart analysis and finding a trade setup, entering and managing the position, and exiting the position. Throughout that process, we need a plan. That is exactly what The Blueprint helps us create and organize.
- **Download and create your Blueprint.** ([Click here](#))  
Once opened, click ‘file’ then ‘make a copy’.

### / Test The Blueprint

- Practice your process by testing it in the open market. We encourage traders to begin with paper trading since there is no risk involved, but the choice is yours.
- The most important part about testing a strategy is following it step by step. For example, consider your stop loss for every trade is -20%, but you continue to let losing trades go to -35%. The results will not be bad because the strategy is wrong, they will be bad because we did not follow the strategy. A basic part of trading is creating a strategy, but the challenge and key to success is to follow the strategy consistently.

## 6. Feedback and Change /

It's uncommon for a trader's first strategy to be successful or the one they end up sticking with. Our goal at this point should be to optimize and improve our strategy. We accomplish this by recording our results. We can then look back at the results and figure out what to change and what to keep/add.

### / Track your progress

- Using and learning from a trading journal is one of the easiest ways to improve your success as a trader. Although journaling as many trades as possible will help you more, even a weekly review of your trades can significantly improve your ability to change for the better.
- **Download and begin your trading journal.** ([Click here](#))  
Once opened, click 'file' then 'make a copy'.

### / First, focus on what went wrong

- Our first step is to identify our mistakes and losses. What went wrong during these trades? How can we prevent them in the future? Identifying these variables will increase our success rate and decrease our losses.
- Consider common mistakes such as small wins and significant losses, fakeouts, poor mentality, and emotions.

### / Then, focus on what went right

- Even as new traders, most of us will have natural strengths in certain trading areas. If you can identify those strengths, take note of them and use them as an edge whenever possible.
- For example, maybe you're comfortable and perform better when trading reversals off a support level. Building your strategy around that



strength or using that strength as a part of your strategy could be a shortcut toward figuring out a successful strategy.

### **/ Take results and new info to optimize the blueprint**

- If you haven't already taken steps to improve your strategy, do so as soon as you can. The sooner you can recognize mistakes and strengths, the sooner you can create positive habits within your trading journey. Accountability and reflection are superpowers in the trading game, and if you have a psychological edge, you can be very successful.

### **/ Create a system for future changes**

- When you use feedback from your journal to grow as a trader, you'll realize how great you could become if you made a habit of it. Schedule in advance and set aside a small amount of time once a month (at minimum) to review your progress and journal. Making this a part of your schedule will increase your ability to adapt and thrive.

### **/ Change is inevitable**

- The only bet in the market that has a 100% chance of winning, is the bet that the stock market will never stop changing. Never be afraid to change and adapt with the market. Accepting and embracing change as a trader is a rewarding trait to have.

## 7. Become a Trader /

### / The risk is on

- If you are reading this step, it means that you have created, tested and improved your Blueprint. When you're ready, now is the time to bring that gameplan to the open market.
- If you have only paper traded before this step, be aware of the variable you have not yet encountered... emotions. When paper trading, there is zero financial risk. Since there is no risk, we subconsciously have very little emotional connection to the position. With this, a lot of people become overwhelmed when they switch to live trading because they aren't used to the emotions at play.
- Sharpening your emotional intelligence in the #emotions-mentality channel of our Discord is a great way to prepare for this change. Learning about and understanding trading psychology is a positive step to take, but this is one of those parts of being a trader where experience will teach you the most. The easiest way to learn about emotions in trading, is to trade.
- As a trader, we need to not only be aware of risk, but accept it. We all know that no one can win every single trade. However, in the moment, many traders freeze when a position turns against them or goes red. It's going to happen. But we have the choice to either minimize our risk and stick to the strategy, or panic and ruin an opportunity. If you accept the risk, the uncertainty of trading is no longer a negative thing.

### / Reflection & Sustainability

- As we progress through trading we need to be self aware or we will fall asleep at the wheel. What we mean by this is to treat your trading account like a business. Understand everything you can about it... be up to date with your average profits/losses, how your account fluctuates, if

you're sticking to your Blueprint, if you're adapting to the market, and most importantly, what your mentality/emotions are when trading.

- Every time you reflect, you have the ability to understand what you need to do to improve and become more successful. Through your trading career, if you make reflecting a habit, you make improving a habit. If you're consistently improving, then you're consistently going to be in position to outperform the market.
- Trading is about sustaining yourself for the long-run, to absorb as much ROI as possible in an effective and precise manner. Maximizing profits and minimizing losses as your account scales month after month. It sounds great, but we can only achieve this if we stick to the gameplan that delivers results.
- Great traders only take opportunities where they have an edge, while there is also an attractive risk to reward ratio present. In other terms, a great trader will only take opportunities where they have a high chance of profiting significantly and a small chance of losing a little. With basic **market knowledge**, anyone can learn how to find these types of opportunities. But **self knowledge** is the determining factor of our ability to successfully manage and benefit from an opportunity.

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The **Trader Blueprint** is not a complete guide to trading, but rather a helpful tool to guide you. You may need to refer back to these steps as you gain more experience and develop your own trading strategy. Some steps may take longer or be easier than others, but all seven steps are important to becoming a successful trader. We can't predict where our trading journey will take us in the future, but starting with these steps is a great foundation.

