

# Personal Trading Strategy Builder

Define your investment approach and create personal trading rules

## Step 1: Investment Profile

### Time Horizon

Select...



### Risk Tolerance

Select...



### Investment Amount per Month (\$)

200

## Step 2: Investment Style

### Passive Index Investing

Buy and hold index funds; minimal trading; lowest costs

### Dividend Growth

Focus on dividend-paying stocks; reinvest dividends

### Value Investing

Buy undervalued stocks; patience required

### Growth Investing

Focus on high-growth companies; higher volatility

## Step 3: Order Type Preferences

### Primary Order Type for Buying

Market Order - Execute immediately



### Will you use stop-loss orders for protection?

No - I'll hold through volatility



### Trading Frequency

Monthly contributions



## Step 4: Personal Rules

### My #1 Rule (e.g., "Never invest money I need within 5 years")

Write your most important investing rule...



### My Sell Criteria (When will I sell?)

I will sell when...



### My Emotional Control Rule

When markets drop, I will...

