



Final Summary: What is your plan?

Market assessment? Bullish? Bearish? Sideways?

Why?

Market Indicators (Indexes) used?

Technical Analysis parameters: First Glance. Deeper Dive. Final Decision. Buy signals. Sell Signals. Hold signals.

Fundamental Analysis: Market Multiples used. Financial Grade. Management Grade. Moats. Dividends. Volatility. Beta.

Options guides: Preferred type. Length of expiry. Greeks. Choice of Strike(s),

Portfolio Management: Review frequency. Preferred mix of mutual funds, bonds, stocks, options (percentages). Plan for evolving in the future.

Money Management Policy: How much money to risk in any position/trade. Accumulation of additional contributions. Distribution strategy. Type of account and allocations (SEP, Roth, Traditional IRA, Open Account (taxable)).