

# First Trade Planning Sheet

A one-page planning tool that helps turn a trade idea into a clear, data-guided process you can review with confidence.

Use this sheet before entering a trade. It is designed to help you connect the chart, the supporting data, the plan, and the learning opportunity in one place.

<b>Date</b>	<b>Ticker</b>	<b>Direction</b>	<b>Call / Put</b>
_____	_____	_____	_____
<b>Account focus</b>	<b>Market environment</b>	<b>Time frame</b>	
_____	_____	_____	_____

## 1. Trade idea

What is the simple idea behind this setup? What is the chart suggesting?

---



---



---

## 2. Chart structure

Trend, support, resistance, pattern, and the areas that matter most.

---



---



---

## 3. Supporting data

Volume, momentum, market context, relative strength or weakness, and any other data points supporting the idea.

---



---



---



---

## 4. Entry area

Where does this setup make sense to enter, and what confirmation would you like to see?

---

---

---

---

### 5. Risk plan

What makes this trade feel structured and organized? Which levels help define the setup?

---

---

---

### 6. Position size

How much capital feels appropriate for this trade and for your account plan?

---

---

---

### 7. Exit plan

What progress would you like to see, and how will you manage the trade if it develops well?

---

---

---

### 8. Post-trade reflection

What did the chart and the data teach you? What would you like to repeat next time?

---

---

---

---