APPENDIX B / WRITING WORKSHEET

My Trading Session Sheet

Use one copy per session, including days when you take no trades.

Date | **Market** | **Account**

Before the session

Include your unit with risk limits, for example USD, points, or %.

The setup I'm waiting for

Risk per trade

My loss limit today

I'll stop taking new trades when

- [ ] I've checked my account limits, open positions, working orders, and today's restrictions.

Given my time and attention, I'll

- [ ] Trade my plan
- [ ] Observe only
- [ ] Sit out

Before I click

Include your unit with risk limits, for example USD, points, or %.

- [ ] My setup is valid at this price.

Risk I can still take after accounting for open positions and pending orders

Estimated loss at my stop, including costs and slippage: per unit × units = total.

Before I click — continued

Unit or currency for this estimate

For example USD or points. The estimate keeps the unit you enter.

Estimated risk per unit | **Units** | **Estimated total**

☐ The size fits my remaining risk budget. If no size fits, I skip the trade.

I'll hold while

I'll adjust or exit if

The actual loss can exceed my estimate. If I feel the urge to chase or win money back, I use the reset card in Appendix C.

Before I step away

☐ I've checked which positions and orders are still open and what needs monitoring.

One decision I made, including staying out

I chose it because

Did I follow my plan?

☐ Yes ☐ No ☐ Unclear

Next time, when | **I will**