

# Guide for Being a Trader or Investor

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The trading and investing world has changed; it became much easier for the private investor. The invention of the Internet has made it, so we can invest from home, twenty-four hours a day. We can make trades, do research, or spend our time getting educated.



By becoming an investor you...

- Become your own boss; or better said, be the boss of your money. Your money is working for you, it is your employee.
- You are able to gain more financial freedom.
- And my favorite part... you are able to get more freedom of your time.

However, to become a successful private investor or trader, you need a system; speaking in legal terms, you need a process of **Due Diligence**: Action steps of how to find, investigate, and appraise potential investment decisions.

Exactly this is where most private investors come short:

- They invest because of a great tip somebody is giving; assuming the person knows what they are talking about.
- Blindly agree to what their broker is telling you; however, is there a potential, brokers want to offload their holdings and you are the one helping them?
- Taking emotional decision lacking systematics and knowledge, letting fear and greed run investment decisions.
- Follow the media without appraising the situation: somebody has to buy at the high, but does it have to be you?

As a solid private trader or investor, you need to have the instruments and strategies on hand to do the due diligence for every trade and investment:

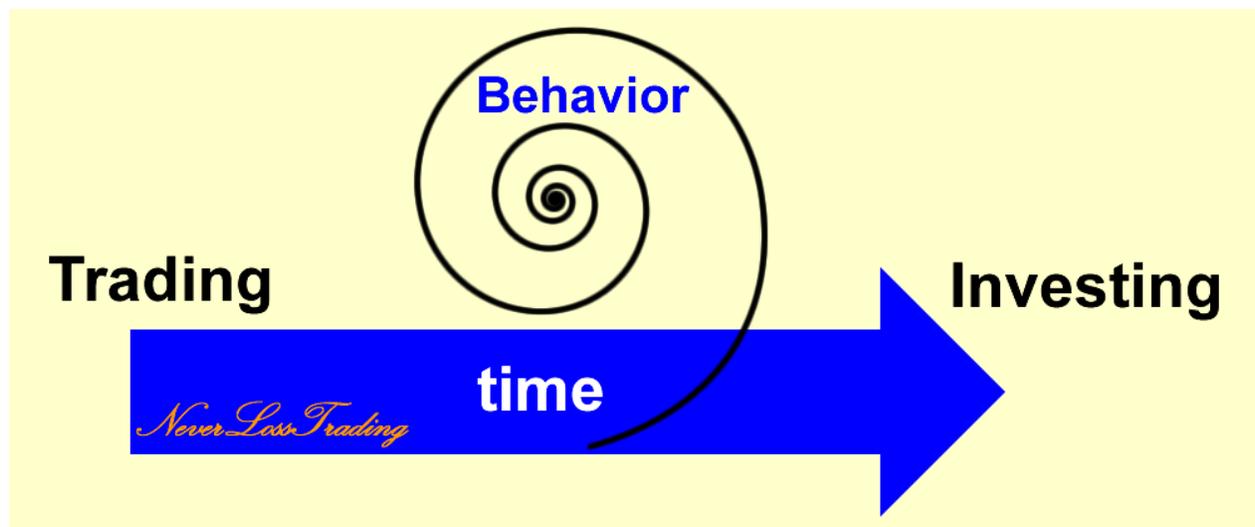
- Working with a method for **finding, identifying** trading and investing opportunities.
- Appraise the **risk** of an investment that you are willing to accept.
- Decide for the **amount of money** you can and want to accept for each trade or investment and appraise for how long you want to be in this investment at minimum, average, and max.
- Definition of **targets** along the expected price move and when to take the entire or part of your investment off.
- **Counter action or exit** strategies when your investment does not work according to the set expectations.

When we talk about trading or investing, we just differentiate by the time frame of expecting to hold a position:

- Trading, rather short-term, holding positions intraday or for a couple of days (swing trading).
- Investing, rather longer-term, holding positions for multiple days, weeks, months or even years.

However, the process of due diligence is not different, just leaves you less time when you operate in a fast pace environment.

### **Chart-1: Trading and Investing is a Function of Time**



To constantly apply the same trading or investing principles, you need a system and a master plan that helps you to follow your own rational or the rational of your system. The less room for interpretation you leave, the higher is the likelihood that you are able to produce consistent long-term results; acting mechanical, not emotionally.

We like to split what is needed to be a successful trader or investor long-term, into three categories:

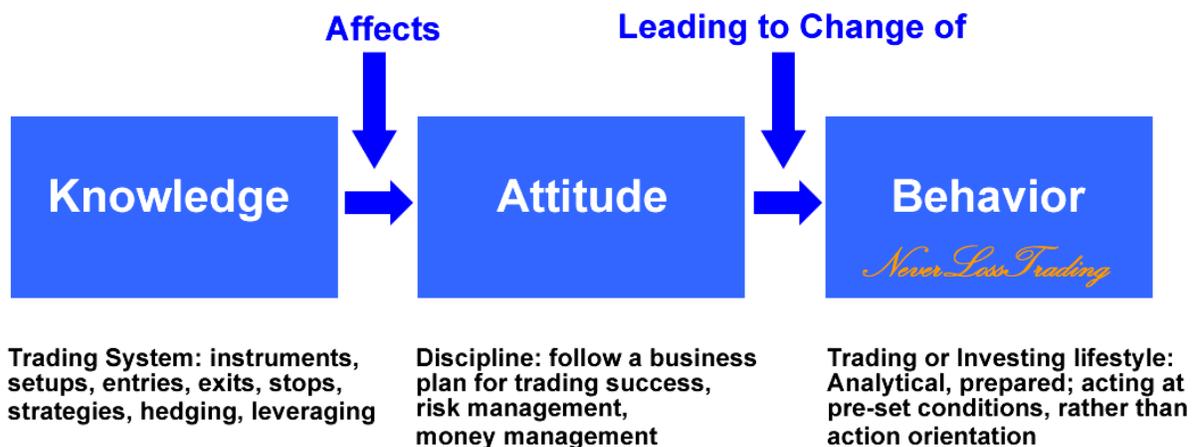
- Knowledge: finding opportunities that follow specific system setups and having the needed asset knowledge and trading strategies on hand to act on favorable opportunities.
- Attitude: Following a pre-formulated principle consistently with discipline and written goals. Specific risk agreements and money management guidelines.
- Behavior: Following the analytical process of the same due diligence over and over; constantly seeking for opportunities.

The following chart helps to express how the components of knowledge, attitude, and

behavior work together and in your favor for turning yourself into the trader or investor that you want to be:

## Chart-2: Components of Being a Trader or Investor

# Knowledge - Attitude - Behavior



The key issue in all this is: besides getting the knowledge needed, being a successful trader and investor needs a change in attitude and behavior. This, however, is a big challenge for all human kind.

Attitude and behavior are majorly influenced by our up-brining and determine our behavior and character. We can quickly change when were forced to; however, we like to stay content and

repeat the same over; even so it did not work in our favor.

When you want to develop yourself to being a Trader and/or Investor, you need leave the comfort of your today's competency base and enter into a new environment where many of the thinking and acting you are used to is in your way.

We categorize four types of income strategies and their related behavior:

**HJ: You Have** a Job and your income comes from employment.

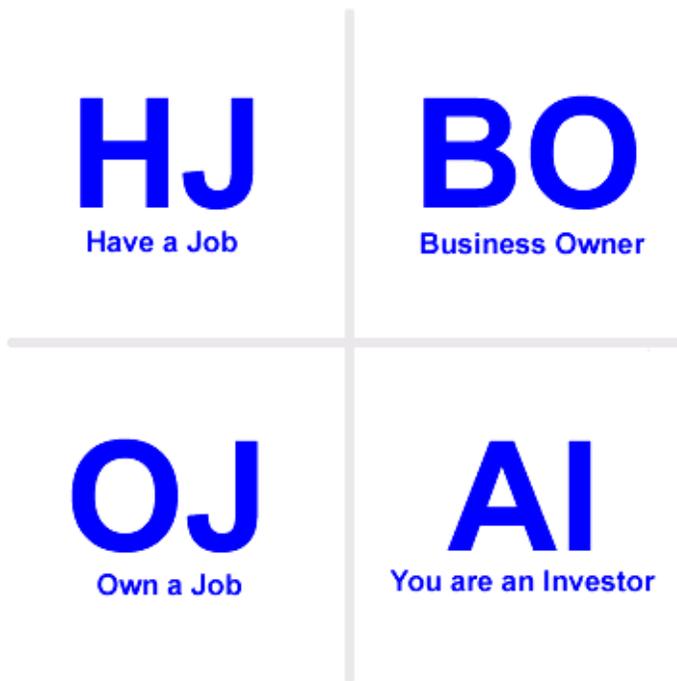
**OJ: You Own a Job**; you are self-employed with little or no personnel.

**OB: You Own a Business** and you make income from others, who work for you.

**AI: You Are an Investor** and your money works for you.

When we draft these income strategies into four quadrants, the graph looks as follows:

## Chart-3: Income Quadrants



When you **Have a Job**, you work for a certain period of time in a more or less structured environment, overlooked by management or the business owner. If you work well, you might get promoted to overlook others to get their job done; selling your time for money.

When you **Own a Job**, you are working by or for yourself: You are a lawyer, a doctor, a consultant. You structure your processes and work mainly on your own or with little help.

As a **Business Owner**, you give employment and gain your income from what others produce for you, while you give them employment and structure their work.

When you **Are an Investor**, you let your money work for you; under the condition that the investment will give you at assumed circumstances and projections a valuable return.

In three of the four quadrants: **HJ, OJ, BO**; the behavior you learn is: hard work gets the job done: You need to act or let others act on your command – you are action-oriented and dedicated – and it pays off.

**AI** is the exception: Only a smart investment gets you the desired return. Thus, you don't invest because it is Monday or if you feel, you are ready to get the job done; you invest when your favorable conditions are met: based on your due diligence process.

In essence:

Being a successful investor requires you to wait for the specific moment rather than initiating it.

Don't get me wrong, it does not mean for you to sit back, doing nothing: You thoroughly analyze and you are prepared, day-by-day, hour-by-hour and when your given conditions are met, you act. This also requires you to operate with multiple strategies to generate your desired income, rather than hoping for the one shot deal, which might never happen.

Unfortunately, most people come to trading or investing with a behavior that does not fit the purpose – and behavioral change is the biggest challenge one can have. Graphically speaking: Humans usually only change when one puts a gun to our head; however, to be a successful investor or trader, you need to change and learn how to apply the right behavior at multiple levels.

With what we share here, we want to help you to understand the needed game plan required

to turn yourself into the successful financial market investor/trader you want to be.

When we are talking about investments, we focus on financial market investments, leaving real estate or other investments aside.

Financial markets allow for fast transactions; where at a given price the exchange of assets is taking place, without the need of a lengthy period of time for securing the legal transaction (compare it to finding and buying a house).

Our goal with this publication is to help you in putting together a guideline for the specific trading or investing behavior:

## **PLAN YOUR TRADE AND TRADE YOUR PLAN**

Why do companies make a plan and shareholders hold them accountable for it?

To produce a structured success; not leaving the future to a random happening.

This is exactly what we want to work on with you:

A business plan for trading and investing success including the following:

## **Guide for Being a Trader or Investor**

**Step 1:** Decide for your trading perspective (time for a return).

**Step 2:** Which assets do you want to focus on as a day trader, swing trader, long-term investor, or combination of?

**Step 3:** Choose your trade signals: Entries, exits, stops, and how they get delivered to you.

**Step 4:** Find applicable trading strategies, including hedging, leveraging, arbitraging, and protecting.

**Step 5:** Trade with the odds in your favor:

Algorithm-based reward/risk assessment.

**Step 6:** Record and evaluate your results and strive for constant improvement.

**Step 7:** Apply clearly defined risk and money management rules.

We fill all of those steps with our knowledge and expertise, offering multiple mentorships to help you to develop yourself towards where you want to be. To learn more about what you will experience trading the markets the

NeverLossTrading way, [check out our info page and make a decision..click.](#)

The secret to trading and investing success lies in preparation, hard work, and learning how to do it right.

If you want to learn how to turn yourself into the trader or investor you want to be, we are here to start the process with you; helping you, to shortening your fairway to what you want to achieve:

Secret	Expectation
Preparation	Solid knowledge about what to trade and invest in and how; is a prerequisite of success. We share what we gathered in more than 30 years and help you to build the right attitude and behavior needed to turn yourself into the trader or investor you want to be. Follow a business plan for trading success.
Hard work	We put more than 10,000 hours in developing proven systems and systematics to spot and follow strong price moves with a likelihood $\geq$ 65% and share this with you in our mentorships.
Learning how to do it right	Be coached along the way, but first know how to do it right and get the help to repeat it: Highly efficient one-on-one learning case by case until it sits.

## Why NeverLossTrading?

We are here to help you in multiple dimensions to obtain the knowledge, attitude and behavior, needed to turn yourself into the trader or investor you want to be.

Let us put this in a short summary and please do not hesitate to contact us on questions:

Call 866 455 4520 or [contact@NeverLossTrading.com](mailto:contact@NeverLossTrading.com)

## Reasons for You to Choose NeverLossTrading

Reasons Why	Basics	Details
Proven <b>High Probability</b> Trading System with <b>≥ 65%</b> predictability of future price moves	<ul style="list-style-type: none"> <li>• Documented attainment rates (for you to check)</li> <li>• Multiple systems suited to your wants and needs</li> <li>• Applicable for all assets: Stocks, Options, Futures, and FOREX</li> </ul>	Let the chart tell, when to buy or sell (real time): <ul style="list-style-type: none"> <li>• Entry, Exit, Stop conditions</li> <li>• Odds appraisal</li> <li>• 10 years in business</li> </ul>
<b>One-on-One</b> Training and Coaching	Teaching and coaching at your best available times with high expertise and focus. Building up your trading and investing skills, combined with the required attitude, and behavior	Focused on: <ul style="list-style-type: none"> <li>• Your trading style and preferences</li> <li>• Your risk tolerance</li> <li>• Your best available times</li> <li>• Your targets</li> </ul>
Execution <b>Guideline</b>	Business plan for trading success: <ul style="list-style-type: none"> <li>• Action plan (trade preparation and execution)</li> <li>• Financial plan (amount of trades, odds based maximum investment, and return expectation)</li> </ul>	<ul style="list-style-type: none"> <li>• Written plan</li> <li>• Documentation in tutorials and real time videos</li> <li>• Journaling and feedback for continuous improvement</li> <li>• Position sizing models</li> <li>• Real time coaching</li> </ul>

We are in business since 2008 and developed multiple systems and the necessary tools and knowledge base to support you in your aim for trading and investing success.

If you want to experience how our systems work live:

Call **+1 866 455 4520** or

[contact@NeverLossTrading.com](mailto:contact@NeverLossTrading.com)

If you are not already subscribed to our free trading tips, reports, and webinars...[sign up here.](#)

Best regards,

Thomas Barmann

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