



# Business Plan vs. Trade Plan

Week 1 – Planning

Week 2 – Mindset

Week 3 – Education

Week 4 – Systems

Week 5 – Execution

**Week 6 – Documentation**



**Course Map**

# Day 1 – Business Plan vs. Trade Plan

Day 2 – Scheduling

Day 3 – SOP's

Day 4 – Toolkit Training & Risk Management

Day 5 – Awareness, Vision & Values



**Course Map**

# **Here's what we're going to cover**

Differences Between Business and Trade Plans

Basics of Incorporating

Trade Plan Notes

## **What this can do for you**

Cement your competitive advantages

Could potentially save your financial life

Develop more business acumen

Increase confidence & conviction

# **Differences Between Business and Trade Plans**

Basics of Incorporating

Trade Plan Notes

# **Business Plan**

This involves Incorporating to protect your personals

It also involves long-term tax strategy

Financing and Accounting

Lists team members

# Trade Plan

Logistics & scheduling

Risk Measures

Performance Targets

Daily notes

Differences Between Business and Trade Plans

## **Basics of Incorporating**

Trade Plan Notes

# **Basics of Incorporating**

Seek expert legal counsel  
(if you can afford it)

If you can't afford expert counsel,

You may still be able to research and open a  
business,

Each state has different requirements,

So, study your own states requirements

If you don't exactly know the specifics of the  
business operations yet,

Ensure that in your company documents,

It's written that you will be doing "all things lawful" or similar language.

Here's some basics you'll need...

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1. Name

Here's some basics you'll need...

1. Name
2. State of Incorporation

Here's some basics you'll need...

1. Name
2. State of Incorporation
3. In most states, you'll need an address in that state

Also, read books on Entrepreneurship

*The Evolution of an Entrepreneur,*

by Jack Nadel, was a great started book

But the basics of Business are,

1. Find a need
2. Fill the need with enough margin for profit
3. 80% of business is brought by referrals
4. That's why it's important to under promise and over deliver to clients & customers, so they rave about your products and/or services
5. Be the best, people gladly pay for excellence

Differences Between Business and Trade Plans

Basics of Incorporating

**Trade Plan Notes**

# **Trade Plan Notes**

# **Pro Forma**

Record Book

Two-year planner

Pocket-sized notebook

Fast smart phone

ASUS Zenbook (recommended)

# **Record Book**

Two-year planner

Pocket-sized notebook

Fast smart phone

ASUS Zenbook (recommended)

# **Record Book Notes**

Date each page at the top

Take good daily notes

Plan each day down to the 15 minute slots and record most important task

Record ALL transactions – note tickers, share quantities, and fill prices

# **Record Book Benefits**

All notes in one spot and organized chronologically

Easily refer to notes and events

Makes planning your day easier

Record of all transactions

Record Book

## **Two-year planner**

Pocket-sized notebook

Fast smart phone

ASUS Zenbook (recommended)

## **Two-year Planner Notes**

Write your definite major purpose on the inside cover

Write out important annual family, friend or shareholder events and plan around them

Write your monthly and weekly goals

Carry it with you everywhere

## **Two-year Planner Benefits**

Keep you focused on your Chief Aim

Keep better track of important dates and annual events

One place for all meetings / appointments

Don't need internet to access

Record Book

Two-year planner

## **Pocket-sized notebook**

Fast smart phone

ASUS Zenbook (recommended)

## **Pocket Sized Notebook Notes**

Carry this with you everywhere

Only record notes on the fly

Carry something to write with always

Not for recording transactions but good for brainstorming

# **Pocket Sized Notebook Benefits**

Take notes on the fly easily

It never dies and won't cause distractions

Can easily brainstorm ideas without cluttering your record book

Lightweight

Record Book

Two-year planner

Pocket-sized notebook

**Fast smart phone**

ASUS Zenbook (recommended)

New

iPhone 15 Pro

Titanium

From \$999 or \$41.62/mo. for 24 mo.<sup>2</sup>

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Record Book

Two-year planner

Pocket-sized notebook

Fast smart phone

**ASUS Zenbook (recommended)**

# **ASUS Zenbook (recommended)**

RAM: 16 to 24 GB

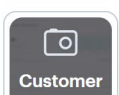
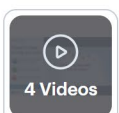
Disk size: 512 GB to 1 TB

Processor: Core i7

Display: 15.6" screen (preferred)

Windows Operating System

Best Buy > Computers & Tablets > Laptops > All Laptops > Windows Laptops



## ASUS - 15.6" OLED Laptop - Intel Core i9-13900H - NVIDIA RTX3050 6GB with 16GB Memory – 1TB SSD - Black

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Trade-In and Save



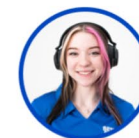
**Save when you trade-in a similar device.**  
Check your trade-in value.



Free 1-month Xbox Game Pass Ultimate & 1 more A \$30 value

**Hot offer** You're going to need Word, Excel, and PowerPoint

Open-Box: from \$936.99



## **Action Item**

Take 15 minutes to brainstorm and think of a  
Business Name

If you already have one, think of another  
different one, for a different trading company

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