

# Conscious Investing Plan (1 Page)

*Mindful decisions • Clear rules • Peace of mind*

Investor Name:		Date:	
Portfolio Goal (e.g., growth, income, balanced):			
Time Horizon (years):		Risk Tolerance (1–5):	

## 1) Allocation Bands (target %, min–max)

Core (e.g., broad ETFs, BTC/ETH):	Target ____%	Band ____–____%
Income (e.g., dividends, T-bills):	Target ____%	Band ____–____%
Growth / Satellite (e.g., AI, L2s):	Target ____%	Band ____–____%
Speculative (e.g., memecoins):	Target ____%	Band ____–____%

## 2) Position Sizing & Risk

Max position size per asset:	____ % of portfolio
Stop-loss / Time-stop rule:	Price-based ____   Time-based ____ days/weeks
Rebalancing cadence:	Monthly / Quarterly / On-threshold ____%

## 3) Decision Journal (use per trade)

Asset & Ticker:		
Why now (1 sentence):		
Hold period:	Max position size:	Exit plan (price or time):
Confidence (1–5):	Emotion (1–5):	Post-trade lesson:

## 4) Monthly Review (check ✓)

<input type="checkbox"/> I followed my allocation bands most of the time.
<input type="checkbox"/> No impulse trades; I respected my position size rules.
<input type="checkbox"/> Wins & losses were journaled with lessons learned.
<input type="checkbox"/> Any rule updates needed? (write a one-liner)

**Disclaimer:** For educational purposes only; not financial, legal, or tax advice. Investing involves risk, including loss of principal.