

Conscious Investing Plan (Fillable)

Mindful decisions • Clear rules • Peace of mind

Investor Name:

Date:

Portfolio Goal:

Time Horizon (yrs):

Risk Tolerance (1–5):

1) Allocation Bands (Target %, Min–Max %)

Core:

Income:

Growth:

Speculative:

2) Position Sizing & Risk Rules

Max position size per asset (%):

Stop-loss / Time-stop rule:

Rebalancing cadence:

3) Decision Journal (Per Trade)

Asset & Ticker:

Why now:

Hold period:

Max position size:

Exit plan:

Confidence (1–5):

Emotion (1–5):

Lesson:

4) Monthly Review (✓ Checkboxes)

Followed allocation bands

No impulse trades

Journalled wins/losses

*Disclaimer: Educational use only. Not financial, legal, or tax advice. Investing involves risk, including loss of principal.
Updated any rules*