

Investment Rule Creator

Why use this?

Most investing mistakes are emotional. This worksheet helps you set clear personal rules that guide your decisions - before you need them.

Use this document to create a framework that reduces reactivity and builds confidence.

1. My investment philosophy

Example: 'I invest for long-term growth and prioritize consistency over speculation.'

My philosophy: _____

2. Entry rules

What must be true before I invest in something?

- It fits within my asset allocation plan.



- I understand the asset's purpose, risk, and how it makes money.
- It has at least a 5-year time horizon.

My custom rules: _____

3.Exit rules

What must be true before I sell or exit an investment?

- My original thesis has changed or failed.
- The asset no longer fits my strategy.
- I've reached my defined profit or stop-loss target.

My custom rules: _____

4.Position sizing rules

How much of my portfolio should any one asset take up?

- No single speculative asset exceeds 5%.
- My core holdings make up 60-70%.

My personal size limits: _____

5. Emotional guardrails

What will I do when the market drops or spikes?

- Wait 72 hours before making any changes.
- Review my rules and check my 5-year goal.

Custom guardrails: _____
