



TRADEway

## UNIT 2

- Before moving to this new checklist, **please complete Unit 1 Checklist.** Remember, this system is built to fit *YOUR* lifestyle, so feel free to play “catch up” until you are ready to proceed with Unit 2.
  
- Complete Your Broker Set Up if needed.** TRADEway recommends tastytrade, however, any broker you prefer will “fit the need”  
*(Reminder: a hammer is a hammer, it'll still get the job done even if one builder prefers one brand over another. Same for brokers!)*  
Tastytrade, or any other broker will have helpful tutorials and a support team if you get stuck anywhere in this process.
  - Get familiar with your new broker!** Click around a bit, learn where to go for support, locate their tutorials, and fund your account when you are ready. *(Note: this does not mean you should start trading with these funds, you will want to complete some paper trades first).*
  - Complete Connection of Broker to Charts if needed** *(this step is only if you chose Charts and have a compatible broker).*
  
- Customize Your Charting Software.** Whether you are using our recommended Charts, or you choose another provider, we encourage you to customize it to fit your preferences. Feel free to change the colors, move things around, locate where to go for

support, and study tutorials as needed. We are here to help, so reach out if you feel stuck!

❑ **Complete Setting Up Your Paper Trading (Sandbox)**

**Account.** This is where you will practice “pushing the buttons” and practice any new strategy you are learning. Be sure not to get stuck in this practice stage for too long. We recommend just becoming familiar with the platform, practicing a few paper trades, and moving to “small money” trading as soon as you feel ready.

❑ **Locate Watchlists in Your Charting Software.** There are saved watchlists, but you may also create your own!

❑ **Practice Drawing Lines in Your Charting Software.**

Remember, you can change the colors, thickness, etc. Fully customize your experience!

❑ **Practice Placing a Practice Trade and Exiting the Trade.**

We recommend doing this inside your paper trading (sandbox) account.

❑ Make sure you have your next **Onboarding Zoom Session booked and saved in your calendar!** *(this is the one where you will meet a Coach and discuss your preparation for trading!)*

If you have any questions please contact us at [support@tradeway.com](mailto:support@tradeway.com) or by calling 877-777-0703. Happy Trading!