



# QUICK-START GUIDE





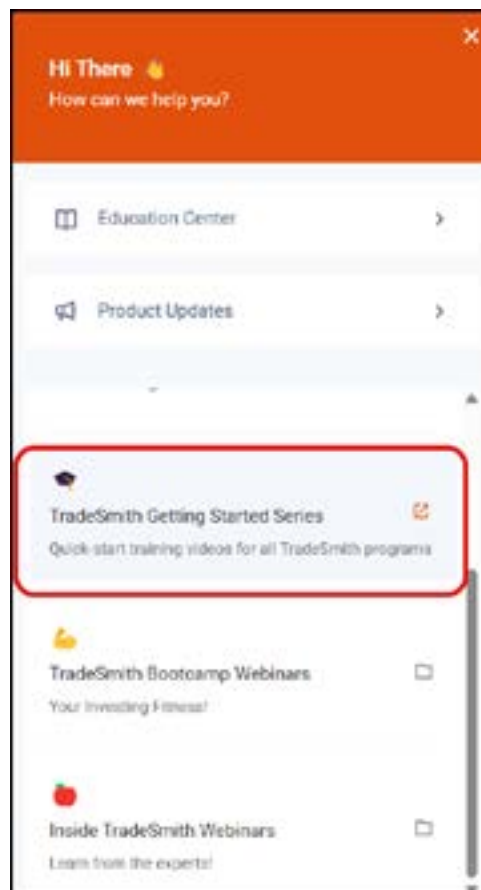
## Quick Start Guide

Use this guide to help you research and evaluate your next great investment opportunity with confidence.

**Pro Tip:** Before You Begin

If you're new to TradeSmith, start with the "Getting Started" series in the Help menu at the top right of your *TradeSmith Finance* platform. It's the best way to familiarize yourself with the tools and features at your fingertips.

Once you've completed the Getting Started series, follow the six steps below to prepare for your next trade.



Step 1: Log In and Import Your Brokerage Account

There are three ways to create a portfolio in your *TradeSmith Finance* platform:

- **Link to Brokerage:** Import your online brokerage account(s) directly.
- **Add Manually:** Create a manual portfolio or watchlist to track new trade ideas.
- **Upload CSV File:** Import a spreadsheet of securities to create a portfolio.

Step 2: Assess the Status of Your Positions.

Once you have synced a portfolio to your *TradeStops* account, you can check the status of each position you hold – or would like to hold.

At TradeSmith, we use a proprietary risk number called the **Volatility Quotient**, or VQ. This number is unique to each individual stock you own and can be used just like a trailing stop from your entry price. If you have a *TradeStops Basic* account you can see how your position is performing relative to the stock’s VQ trailing stop. Is it a healthy distance above or has it fallen below the stop-out point?

If you have a *TradeStops Plus* account, you can use the stock’s at-a-glance **Health** indicator, which uses the stock’s VQ trailing stop, but bases it on the stock’s most recent high. This is usually a more conservative signal to use and is as easy as reading a stoplight. Green means the stock is healthy, carry on; yellow means proceed with caution, hold for now; and red means the stock is acting outside its normal range and is best avoided.

Step 3: Research new potential trades

Use the **Search for Ticker** field in the upper-right corner of your dashboard to find any stock. You’ll be directed to the **Asset Details** page.



The Asset Details page gives you a complete snapshot of each security — including key statistics, financials, chart data, and exclusive TradeSmith indicators — to help you make smart, confident decisions.

**Pro Tip:** Create a personalized trade plan and define specific criteria a stock must meet before entering a position.

Step 4: Strategize Your Exit

TradeSmith helps you stay disciplined in your trade planning. Emotional investing — driven by fear or greed — often leads to missed opportunities or unnecessary losses. Our system is designed to help you avoid those pitfalls.

What’s Your Exit Strategy?

**TradeSmith’s Choice:**  
One option is to follow TradeSmith’s proprietary **Health Indicator** — as described earlier, this is a simple, color-coded system that helps guide your decisions. If you have *TradeStops Plus* or higher, it can be activated across all your portfolios through your program settings.

**Alternative Choice:**  
If a stock enters the Red Zone but you still have a strong reason to stay invested, consider using a **VQ% trailing stop** or setting your own **custom percentage trailing stop** as your exit strategy.

Are you ready to buy the stock?

Now, it’s time to determine how many shares to buy.

Step 5: Position Size

To access the Position Size tool from the Asset Details page, click on the **Calculate Position Size** link under the **More Actions** drop-down menu button (upper right). You can also access the tool from the Position Size tab on your **Invest page** (top navigational header).

How much are you willing to risk in this trade?

Our **Position Size** tool offers both flexibility and robust risk management. Whether you prefer to size your position based on a specific investment amount or a defined risk allocation, the tool adjusts accordingly. It also factors in each security’s **Volatility Quotient (VQ)** — helping you invest an appropriate amount based on the unique risk profile of the asset.

By this point, you’ve taken all the essential steps to prepare for your next trade — from importing your portfolio and optimizing risk, to researching potential opportunities, defining your exit strategy, and determining the right position size.

These foundational tools are designed to give you structure, clarity, and confidence in every investment decision you make.

Your TradeSmith journey doesn’t end here — in fact, it’s just getting started.

As you continue to explore the tools at your fingertips, we encourage you to take full advantage of the educational resources available to support your growth and confidence as an investor.

Step 6: Continued Education (Help Menu)

Discover tutorials, webinars, and more — all designed to help you make the most of your TradeSmith experience.

- **Concierge Appointment:** Set up a one-on-one phone appointment with a knowledgeable agent who can walk you through the program or answer your questions.

- **Education Center:** Inside your *TradeSmith Finance* account, you can use the Help menu to review our library of educational content (Getting Started series, articles, glossary, *Inside TradeSmith* webinars, and Bootcamp webinars).

**Parting thoughts.** A few minutes of planning before you buy that next stock will go a long way toward helping you become a more profitable and methodical investor.

**TradeStops** makes the research, planning, and position sizing steps much easier, so you can have the confidence of an investment pro.

**Customer Success:**

Monday-Friday 9 a.m. to 5 p.m. Eastern

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