

**Trader 1:** a successful software company executive in charge of the development team of 25 programmers, in his mid-40s and who has been dabbling with trading for 15 years finally committed to performing at a professional level by focusing on one symbol at a time, lives bar by bar trading practice in public on camera in our coaching room. Over the course of six months in front of an audience of over 20 traders each night he documented his trade set ups and decision-making and received feedback while learning to personalize the rules for his own particular risk profile and skill set. By committing to full transparency in his decision-making in public for the record, he learned to develop a thick skin necessary as a trader to endure the constant pressure of anxiety uncertainty which can be found in all of the best trade setups. Shifting to the longer-term swing trading, he found that was a better timeframe for his family and business situation and is now doing the same weekly work with public trade frames and decision-making in order to receive real-time meaningful coaching that has been dramatically improving his performance and serving as an excellent example to others. His annual write up that documented his journey from dabbler to professional trading was a model of the integration of systems self and market that we focus on. He continues to be an inspiration and his ongoing weekly trade frames are a very efficient way for the community of practice to learn how to do it right.

**Trader two:** a professional accountant who had no trading experience and in his mid-40s felt a need to prepare for a career shift after 20 years as a successful certified public accountant running his own business with the team underneath him. He had no trading experience and after taking our foundations course to get a broad sense of the different styles opportunities and techniques that we teach one pattern, one symbol intraday trading in public and began documenting his journey for a full year in which he accumulated over 2000 day trades, each marked up with the lessons that he learned after performing the trade and offering those into our public coaching room to receive 5 to 10 minutes of personalized guidance which he agreed to share with others in order to promote their learning and his accountability. After a successful year, he did an annual after action review and together we determined that he was ready to trade more symbols and more patterns in order to become more diversified with wider opportunities. The lessons that he learned in that extensive daytrading experience prepared him for trading in multiple time frames and he continues to perform at a high level and has become an independent professional trader while offloading his accounting business to trusted subordinates. His change in lifestyle was deliberate professional and incremental. He leveraged the discipline of accounting and business to professionalize his own trading and after two years he has achieved his goals and objectives. It was important that his wife was a full voting member on his support team throughout the process.

**Trader three:** is a professional musician who after 20 years in an organized musical career in support of several churches, and after recording a number of professional CD albums, this trader also was looking to make a career shift to part-time and/or full-time professional trading. He made a very deliberate plan to explore the different kinds of trading opportunities that were available, in all different markets and trading platforms. He taught himself to code and to leverage that power to perform his own detailed back testing which he used to independently validate software and systems. The same perfect practice that he applied in his musical career has enabled him to find his niche as a swing trader who occasionally day trades when the swing trade is set up in an ideal condition and he has learned to become a very effective interpersonal coach to help others find ways in which they can align themselves with systems that are a good fit for their personality, skill set and goals. He is well on his way to trading in coaching

full-time, a transition that he has also approached in a deliberate professional adult manner, informed by his roles as husband and father.

**Trader four:** is a full-time professional trader who had a skill set and niche for intraday trading in currency and commodity futures pairs but was looking to add techniques and insights to leverage in order to become a proprietary fund trader with more funds under management. He was able to graft our technical instruction and decision-making framework, polished with the same bar by bar and nightly public coaching that allowed him to achieve his career objectives in less than six months in which he significantly improved his win rate, risk management and daily capture rate. He's now managing enough money that his portion of the take is fully meeting all of his objectives and which will allow him to scale as far as he wants to go. It's important to note that he was able to polish his skill set and build off a strong foundation which contributes to his accelerated learning rate. His relentless focus on specific pairs for trading time frames that are appropriate for the instruments and market conditions over multiple time frames are the cornerstones of his success.

**Trader five:** is a professional educator and former military officer with a PhD in economics and who has taught himself how to program in order to turn his FOREX trading systems into semi automated and fully automated systems that work on hourly charts throughout the week on 24 different currency pairs. Although fully automated bowl, he prefers to use the semi automated mode in order to keep a human in the loop. The hourly charts allow him to increase his span of control to comfortably manage all 24 pairs throughout the week. He recently retired from a good paying job as a professor in a Department of Defense military college in order to concentrate full-time on developing and teaching his systems with the cadre of traders that are working together with him as a trading tribe. He's made the full transition to full-time trading in his retirement life stress and increased his peace of mind having left the trivia of the academic life behind him. We helped him develop a homestudy course as a way to help him further refine his specific rule sets, because there's nothing like trying to teach your system to others to help you learn all of the details that you need to make explicit parts of your system. This is an insight that we use typically to help advance traders become masters of their own systems. As the late great trader Robert Gardner was fond of saying, the only way to know exactly what all the rules of your systems are, is to teach it to someone and watch what they do without speaking. If they execute exactly as you intended then there's a good chance that you have captured all the rules and conditions of your system. But you don't know until you've gone through that exercise.

**Trader six:** is a retired software engineer who has been trading the markets for over 30 years and has a CMT credential and who has been in search of swing systems that are robust across multiple market conditions and instruments in order to provide a steady stream of income to supplement his retirement funds. He is risk-averse and incredibly systematic with a deep attention to detail. His best learning strategy was to develop concise systematic and disciplined note sheets to summarize all of our workshops and nightly coaching sessions to capture the insights, terms of art and specific concepts that populate our systems. These note sheets have been so effective for his learning that we've made them available to others as a way to accelerate their learning. By partnering with a couple systems developers, we been able to create a team that can produce instructional videos with supporting

educational material to an extremely high level and this has been a great contribution to the community of practice. His swing trading has improved remarkably over the last 18 months as well.

**Trader seven:** is an emergency room nurse and hospice nurse who recently survived open heart surgery which was extremely successful, and who needed to reduce the stress in his life. Against my advice he opted for full-time intraday and swing trading. He has been studying my material for over 20 years and has developed his own intuitive style of applying the rule sets in a way that leverages his own nursing humanistic intuition and his deep knowledge of self. His confidence and maturity, honed over decades of working in high stress healthcare situations has given him a deep and profound knowledge of self. He has an intuitive understanding of statistics and price action and market psychology which has enabled him to develop a set of proven battle tested drills and patterns that you will see in this book described as sniper trading. It turns out that his decade-long practice of teaching young nurses the profession has made him a superb one-on-one coach and small group instructor for his systems which we have made systematic and robust. He has successfully transitioned into his retirement and is enjoying life as a full-time trader and coach.

#### **The full-time professional traders and money managers:**

**trader eight:** this is a pair of life partners who been trading professionally for over 20 years across all time frames and market conditions but really specializing in automating the rule sets to allow for maximum span of control and detailed decision-support in order to perform high-frequency intraday trading across many markets including futures, options, currencies, equities. One of the partners is on the board of the major international association of independent traders and he brings to the table a deep and profound knowledge of technical analysis, automated systems development, a wide range of indicators and their uses and the ability to produce bulletproof automated trading robots. Our value add to this pair has been in the systematic coaching and strengthening of their psychological stress management as well as introducing several simple robust ideas that they been able to personalize into their own trading systems. They continue to give back to the community of practice with their many trading ideas and willingness to share the inside stories of what it takes to develop systems that can manage other people's money.

**Trader nine:** has been a professional money manager for over 35 years and caters to high net worth traders only. He has been an active participant in our community of practice as a senior advisor and mentor, behind the scenes and always anonymously because of compliance considerations. He has helped us learn to apply our intraday techniques across longer-term time frames and was instrumental in helping us develop our fractal approach to systems. We are constantly on the look for concepts and ideas that are effective in multiple time frames, because we've learned that these are the most robust ideas and seem to be connected to something fundamental in our human nature as traders regardless of whether we are high-frequency day traders or long term position managers. His wisdom and guidance and ability to see low probability, high-impact consequences of trading concepts has been in an important part of our success over the decades.

**Trader 10:** has been a professional money manager for over 10 years after successfully changing his career from corporate tax law to professional money management as a way to achieve life goals and genuine independence in his personal life. He started studying with this 10 years ago with our foundations course and participated every year in our annual research weekend in order to get peer review of fundamental concepts that he felt had long-term value for his dream money management

firm. Over the years he developed multiple systems and refined existing systems until he was prepared to completely transition into money management full-time where he has been successfully navigating the chaotic markets in the Covid area very successfully and in a low risk managed way much to the satisfaction of his clients. He continues to offer insights about volatility and fixed income and value investing for our longer-term time horizons.

The snapshot of 10 of our success stories from our trading community of practice have all learned to personalize and adapt our basic systems and point of view to their own personal circumstances and have been successful at learning to adopt the specific habits of mind and processes that make professional traders stand out from the masses. They found ways to leverage the strengths that were appropriate from their previous careers while protecting against beliefs and assumptions from their old life that might not be effective in the strict trading arena. What really binds them together and is common to all is the willingness to share, the willingness to do the due diligence and the emotional resilience it takes to keep going when things get tough. They've all approached the acquisition of trading skill as a professional career choice and have learned that just like any other career you have to respect the game and the other players in order to compete. We look forward to sharing with you some of the same ideas that we've shared with them in this book