DIVIDEND CAPTURE PRO - QUICK START CHECKLIST

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Read the book first. This checklist is the on-ramp, not the system.

BEFORE YOU TRADE

- ☐ Reread Chapters 10-14 before placing any real trade.
- ☐ Build or download the Trade Tracker. A spreadsheet you understand beats a fancy tool you don't.
- ☐ Build your capture calendar from real upcoming ex-dividend dates.

ACCOUNT LANE CHECK

- ☐ Rule Zero: IRA-first, where appropriate for your situation. The taxable lane is separate and harder.
- ☐ Talk to a qualified tax professional before attempting taxable-account capture.

START WITH OBSERVATION, NOT ACTION

- ☐ Build a watchlist of names you would genuinely consider.
- ☐ Log every candidate - including the ones you reject. Rejecting weak trades on purpose is the skill.
- ☐ Paper-review several candidates through the full checklist before risking a dollar.

EVERY TRADE

- ☐ Written thesis before entry - and yield is not a thesis.
- ☐ Written exit rule before entry: target, give-up point, time stop. No written exit, no trade.
- ☐ Position sized so a full loss is annoying, not damaging.
- ☐ The dividend is not the profit. The whole-number result is the only result that matters.
- ☐ Recovery takes days, not hours - and it is not guaranteed.

AFTER EVERY TRADE

- ☐ Reconcile with the brokerage record. It outranks the tracker; the tracker outranks your memory.
- ☐ Review every win and every loss. A win still gets reviewed. A loss must buy a rule.
- ☐ Same ticker does not mean safe ticker - every ex-date restarts the review.

YOUR FIRST 30 DAYS

Build the operation, not the account balance: tracker, calendar, paper reviews, deliberate rejections, and - if

appropriate - one small real trade run through every gate. "No trade" is a complete and often excellent result.

For personal financial, tax, or legal questions, consult qualified professionals.
