

Crypto Inheritance Checklist

A secret-free worksheet for discovery, legal coordination, recovery design and rehearsal.
Complete it with your heir, executor and qualified advisers.

CRITICAL RULE

Do not write a seed phrase, private key, wallet PIN, passphrase, password, or two-factor recovery code anywhere in this PDF.

The five-part plan

1

Inventory

List assets and where instructions live, without recording secrets.

2

Custody

Map exchanges, wallets, multisig signers, shares and contracts.

3

Instructions

Separate legal ownership from technical recovery steps.

4

Mechanism

Choose a transfer path the real beneficiary can operate.

5

Rehearsal

Test with a small amount and record what needs correction.

Plan identity

PLAN OWNER

PRIMARY BENEFICIARY

JURISDICTION FOR ESTATE ADVICE

NEXT SCHEDULED REVIEW

1. Secret-free asset inventory

Use public identifiers only when needed. A person finding this page should learn where to look, but should not be able to spend anything.

Wallet / provider	Asset and network	Public reference	Instruction location

2. Custody and transfer decision

- ☐ Exchange or regulated custodian estate process
- ☐ Wallet-supported multi-share backup
- ☐ Multisig with independent signers
- ☐ Time-based smart-contract mechanism
- ☐ Other method reviewed with advisers

WHY THIS METHOD FITS THE BENEFICIARY'S ACTUAL SKILLS

MAIN FAILURE MODE AND PLANNED MITIGATION

POINTER TO SEPARATELY PROTECTED RECOVERY INSTRUCTIONS - LOCATION ONLY

Safety check: the inventory, will and this worksheet contain no credential that can sign or authorize a transaction.

3. Legal and people layer

EXECUTOR OR ESTATE REPRESENTATIVE

TECHNICAL HELPER

QUALIFIED LEGAL ADVISER

QUALIFIED TAX ADVISER

☐ The will identifies the asset class and beneficiary, but contains no spending secret.

☐ The beneficiary knows where to find this plan and whom to contact first.

4. Rehearsal log

REHEARSAL DATE

TEST AMOUNT

NETWORK / PROVIDER

WHAT THE BENEFICIARY SUCCESSFULLY COMPLETED

WHAT FAILED, CONFUSED OR DEPENDED ON THE OWNER

CORRECTIONS MADE AND PERSON RESPONSIBLE

5. Annual review

☐ All wallets, providers, networks and public references are current.

☐ The beneficiary still controls the recorded address or account.

☐ All required signers or recovery shares remain available.

☐ The executor and technical helper can still serve.

☐ Timer settings and reminders still match the owner's circumstances.

☐ Provider procedures, contract status and security disclosures were rechecked.

☐ Legal and tax advice still matches the relevant jurisdiction.

☐ A small rehearsal was completed after every material change.

REVIEWER INITIALS AND DATE

NEXT REVIEW DATE

Review immediately after a wallet migration, beneficiary change, lost device, suspected exposure, material asset change, relocation, marriage, divorce, death of a signer, or change in law or provider procedure.