Crypto inheritance planning checklist

The printable crypto inheritance planning checklist: inventory, estate map, handover method and yearly review, with the safe-documentation rules built in.

This is the printable version of the crypto inheritance planning guide. It turns the plan into tick-off actions for owners: what exists, where it is, how access is handed over, and when to review. Print it, work through it once, and keep the completed copy with your estate documents.

PDF: Download the planning checklist to print or fill in. The secret-free estate map template is the companion form.

The one rule before you start: this checklist tells your family what exists and where. It never contains the secret material itself, no seed words, no keys, no passwords. Anything secret stays out of every document you fill in here.

1. Inventory, what exists

- [ ] **Exchange accounts**, one line per platform and the account identifier (never the password)
- [ ] **Self-custody wallets**, software, hardware and paper wallets you hold keys for
- [ ] **Hardware devices**, which devices exist (make and model are fine) and where they are kept
- [ ] **Recovery material**, where it is stored: a safe, a bank box, a trusted person (the location, never the words)
- [ ] **DeFi positions**, staking, lending, liquidity pools, governance tokens
- [ ] **NFTs and other tokens**, collections and marketplaces used
- [ ] **Mining or validator setups**, equipment, pool accounts, rewards addresses
- [ ] **Crypto held by others on your behalf**, custodian, adviser, family member, company
- [ ] **Crypto debts and collateral**, loans backed by crypto, margin positions, locked balances

The inventory is the same document an executor would build after a death; see the crypto estate inventory for the format.

2. The map, where it is

- [ ] **A written map exists**, with your lawyer or notary, or in a place your trusted people can reach
- [ ] **First contacts listed**, who to call per category (exchange support, adviser, custodian), with names and contact details
- [ ] **Device locations recorded**, including off-site storage and bank boxes
- [ ] **Recovery-material locations recorded**, locations only, never contents
- [ ] **Account list per exchange**, without passwords or login details
- [ ] **2FA situation noted**, which accounts use an authenticator app, and where the recovery codes are kept (location only)
- [ ] **A trusted person knows the map exists**, and how to reach it after you cannot

3. Handover, how access passes

- [ ] **Exchange inheritance procedure known**, check each platform's official process for accounts after a death or its estate/beneficiary options
- [ ] **Will updated**, crypto is mentioned in your estate documents; see crypto in a will
- [ ] **Will vs trust considered**, compare honestly in crypto will vs trust
- [ ] **Multisig evaluated**, for large or long-held balances; see bitcoin multisig inheritance
- [ ] **Password manager emergency process set up**, so a trusted person can request access under defined rules, without anyone holding your master password today

- [ ] **Custodian arrangement decided**, if a professional holds part of the access chain, the agreement is written down
- [ ] **The executor knows crypto exists**, and who the first contact is for each asset

For the full menu of mechanisms, compare the options in options for passing on crypto and crypto inheritance tools.

4. The safe-documentation rules: check before filing

- [ ] No seed words, private keys or passwords appear anywhere in this checklist or the map
- [ ] No photographs of recovery cards or printed keys exist in the estate documents
- [ ] No secrets were sent by email, messaging or cloud notes
- [ ] If a secret document must exist, it is in a lawyer's or notary's sealed vault under their professional custody rules: decided with the professional
- [ ] The completed checklist contains only facts and locations, and you could show it to a family member without compromising anything

5. Review, keep the plan true

- [ ] **A yearly review date is set**, pick one recurring date (for example, with your annual tax filing)
- [ ] **Triggers listed**, update the plan after: a new exchange account, a new wallet or device, a move, a divorce, a death in the family, or a change of trusted person
- [ ] **The plan is tested**, could a competent person act on it without you present?
- [ ] **Reviewed on:** ___ / **by:** ___, date and name each review

What this checklist is not

It is not a place for secrets, and it does not replace the legal steps: a will, a trust or a notary's advice still decide who inherits under local law. It is also not investment advice, the goal is that your crypto reaches the right people, not that it grows. For the reasoning behind every item, read the full crypto inheritance planning guide. For what happens if you cannot act before death, see crypto and incapacity.

Keep this checklist with your estate documents. If a line ever invites you to write words, a key or a password, write the location only - and never the secret itself. The full method and current sources are on https://inheritedcrypto.com