Crypto Wealth Planning Checklist

A simple preparation worksheet for custody, estate planning, tax support, and administrative organization.

Custody & Access

- ■ List wallets/exchanges without exposing seed phrases.
- ■ Confirm who can access accounts in an emergency.
- ■ Separate personal notes from private keys or recovery phrases.

Entity & Records

- ■ Confirm whether LLC, trust, or other structure is being reviewed.
- ■ Keep receipts, statements, and transaction records organized.
- ■ Store formation documents and EIN letters securely.

Tax & Reporting

- ■ Export transaction history from wallets/exchanges.
- ■ Track gains/losses and income-like activity.
- ■ Share records only with qualified tax professionals.

Estate & Continuity

- ■ Document who should be contacted if something happens.
- ■ Review beneficiary and trustee planning with professionals.
- ■ Avoid putting private keys directly into ordinary estate documents.

Security Review

- ■ Use hardware wallets when appropriate.
- ■ Turn on strong authentication.
- ■ Avoid sharing recovery phrases by email, chat, or web forms.