

ANNUAL REVIEW WORKSHEET

Complete this worksheet once a year - ideally on the same date each year. A 20-minute review now can prevent months of problems for your Executor later. File the completed worksheet with your estate documents.

REVIEW DATE _____

YEAR OF WILL _____

PART A - LIFE & FAMILY CHANGES

Question	Yes	No	If yes -action required
Have you married, divorced, separated, or entered/ended a de facto relationship?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Marriage may revoke a Will in Australia. You likely need a new Will immediately. Seek legal advice.</i>
Have you had a child, or has a child entered your family (adoption, step-child)?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Review testamentary trust provisions (Clause 7), as well as guardian provisions (Clause 6). Update Letter of Wishes. Consider updating Bitcoin Estate Administration and Executor Education Guide.</i>
Has a beneficiary died, become incapacitated, or moved overseas?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Review substitution provisions. Consider updating the Will if no substitution clause covers the situation.</i>
Has your Executor died, become incapacitated, or is no longer a suitable choice?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Update Will to appoint a new Executor. Do not delay -a Will with no available Executor creates significant problems.</i>
Has your Digital Asset Adviser changed?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Update the Letter of Wishes. Brief the new adviser (note: no legal standing under the Will -practical assistant only).</i>

PART B -BITCOIN HOLDINGS CHANGES

Question	Yes	No	If yes -action required
Have you created any new stacks or custody arrangements?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Add the new stack to the Digital Asset Inventory. Update the Letter of Wishes. Update the Will if the new stack is to be specifically bequeathed.</i>
Have you consolidated, moved, or retired any existing stacks?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Remove the old stack from the Inventory. If the Will references a label that no longer exists, confirm the residuary clause covers it.</i>
Have any seed phrases, passphrases, or descriptors changed?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Update the Technical Roadmap by hand. Destroy the old version securely. Verify the new version is stored separately from the Will.</i>
Have hardware wallet firmware or multisig apps been updated in a way	<input type="checkbox"/>	<input type="checkbox"/>	<i>Walk through the Technical Roadmap step-by-step to verify an</i>

Question	Yes	No	If yes -action required
that changes the descriptor or signing process?			<i>Executor could still recover funds using the current instructions.</i>

PART C -DOCUMENT INTEGRITY CHECKS

Question	Yes	No	If yes -action required
Are all stack labels identical across the Letter of Wishes and Digital Asset Inventory?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Correct any mismatch immediately. A label difference could mean a specific bequest fails and the holding falls into the residuary estate.</i>
Does the testamentary trust vesting age match between the Will and the Letter of Wishes?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Confirm both documents show the same age (default: 25). If mismatched, the Will controls - update the Letter of Wishes to match.</i>
Has the Beneficiary Personal Message and Education Guide personal message section been completed?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Complete the 'INSERT YOUR OWN EXPLANATION HERE' section. Print the updated version and replace the blank copy stored with your kit.</i>
Is the original Will still physically in the expected storage location?	<input type="checkbox"/>	<input type="checkbox"/>	<i>Locate it now. If it cannot be found, treat this as urgent -contact a solicitor about options.</i>

ACTIONS ARISING FROM THIS REVIEW

- Document /section to update: _____
- Document /section to update: _____
- Document /section to update: _____
- Seek legal advice on: _____

NOTES FROM THIS REVIEW

SIGN-OFF

REVIEWED BY

DATE COMPLETED

NEXT REVIEW DUE
