

# KIT COMPLETION CHECKLIST

## Complete before signing your Will.

Work through this checklist in order. Each section corresponds to a document in your kit. Do not proceed to the Signing Ceremony section until every item above it is checked.

### 1. THE WILL

Open your Will template. Complete every field and make every optional clause decision before checking these off.

- Your full legal name entered as Testator**  
*Use your name exactly as it appears on your passport or birth certificate.*
- Current residential address entered**  
*Use your current residential address.*
- Primary executor: full name and address entered**  
*Clause 1.1. This person will administer your estate. Confirm they have agreed.*
- Alternate executor: full name and address entered**  
*Clause 1.1. Recommended — if your primary Executor cannot act, the backup steps in automatically.*
- Specific gifts: specific gifts included with named beneficiary**  
*Clause 2. If you use this clause, include full name, relationship to the beneficiary and a clear description of the gift.*
- International assets and foreign tax**  
*Clause 4. Include if you have international assets or foreign tax status, otherwise delete.*
- Simultaneous death and minimum survival**  
*Clause 5. If you have no spouse, de facto or otherwise, this may not apply and could be deleted. If in doubt, keep it in.*
- Guardian of minor children**  
*Clause 6. Include full name and address of guardians, as well as alternate guardians.*
- Testamentary trust for children**  
*Clause 7. If you use this clause, include full name of trustee and their address. Be sure to also review the vesting age and amend if needed and ensure consistency throughout.*

**Residuary estate**

*Clause 8. Full name required and relationship to the beneficiary or beneficiaries named, whether you select a single beneficiary or more than one. Once you have made the decision, delete the part of clause 8.1 that doesn't apply and read twice to ensure the clause captures your intent. Choose alternate beneficiary or beneficiaries in clause 8.3 and delete whichever doesn't apply.*

**Governing law**

*Clause 11. Insert current state where you ordinarily reside.*

**Final version printed — no blank fields remain**

*Scroll through the complete document. Any remaining placeholder text must be completed or deleted.*

## 2. DIGITAL ASSET INVENTORY

*List every bitcoin holding your Executor will need to locate and recover.*

**Every active stack listed with a unique label**

*The label you assign here is the label you must use in the Letter of Wishes. Keep it short and unambiguous (e.g. 'Cold Storage A', 'Multisig Vault').*

**Custody type recorded for each stack**

*e.g. single-sig hardware wallet, 2-of-3 multisig, exchange account, mobile wallet.*

**Physical device location noted for each stack**

*Where is the hardware wallet / seed backup stored? Your Executor needs to be able to find it.*

**Any exchange accounts included with login instructions noted**

*For exchange-held bitcoin, include the exchange name, account email, and where 2FA recovery codes are stored.*

**Retired or empty stacks removed from the Digital Asset Inventory**

*Do not list stacks you no longer hold. Phantom entries create unnecessary work for your Executor.*

**Digital Asset Inventory printed and stored with estate documents (not the Technical Roadmap)**

*The Digital Asset Inventory does not contain recovery data - it can be stored alongside the Will and the Letter of Wishes. You may keep a physical copy only, or maintain both physical and digital backup copies for convenience.*

## 3. LETTER OF WISHES

*This document gives your Executor practical guidance. It is not legally binding but is critically important.*

- Digital Asset Adviser named with full contact details**  
*This person assists your Executor with the technical recovery process. They have no legal standing under the Will — they are a practical guide only. Make sure they know their role.*

- Bitcoin stack labels entered — identical to the Digital Asset Inventory**  
*Copy the labels character-for-character from your Digital Asset Inventory. Any mismatch between the Digital Asset Inventory and Letter of Wishes may cause confusion during estate administration.*

- Specific instructions entered for each stack**  
*What does the Executor need to know about each holding? Custody type, approximate value, and whether recovery requires the Digital Asset Adviser.*

- Testamentary trust vesting age confirmed — matches the Will (Optional)**  
*If you changed the default age (25) in the Will, update this document to match.*

- Personal guidance to beneficiaries written (optional but recommended)**  
*Use this section to explain your philosophy, your wishes for how bitcoin should be managed, and anything your Executor or beneficiaries should know that the Will does not cover.*

- Letter of Wishes printed and stored with the Will**  
*Unlike the Technical Roadmap, the Letter of Wishes does not contain seed phrases or recovery data and can be stored alongside the Will.*

## 4. TECHNICAL ROADMAP (OPTIONAL)

*STOP — READ BEFORE COMPLETING THIS SECTION. The Technical Roadmap must be completed by hand, on a printed copy, with the digital file permanently closed. Never type recovery information into this document. Never store it alongside the Will or Inventory.*

- Technical Roadmap edited digitally, then printed**  
*Complete all fields by hand using a pen.*

- Recovery process documented for every stack in the Inventory**  
*Step-by-step instructions for how an Executor (with technical assistance) can access each stack.*

- Seed phrase storage locations described — not the phrases themselves**  
*Describe where the seed phrase backup is physically stored (e.g. 'Steel plate in grey lockbox,*

bedroom wardrobe'). Do not write seed phrases in this document unless it will be stored in a dedicated secure location.

- BIP39 passphrase information recorded (if applicable)**  
*If any wallet uses a passphrase in addition to the seed phrase, note where that passphrase is stored or how it can be recovered.*

- Multisig descriptor or xpub information included (if applicable)**  
*Required for multisig wallets. Without this, even a valid seed phrase may not reconstruct the correct wallet.*

- Completed Technical Roadmap stored separately from the Will and Digital Asset Inventory**  
*Store in a different physical location — ideally a fireproof safe, safety deposit box, or with a trusted third party. Your Executor must know where it is, but it should not be co-located with the Will.*

## 5. BENEFICIARY PERSONAL MESSAGE AND EDUCATION GUIDE

*This document helps your beneficiaries understand bitcoin when the time comes. It has a section you must write yourself.*

- Personal message section completed ('INSERT YOUR OWN EXPLANATION HERE')**  
*This is the most important part of the Beneficiary Personal Message and Education Guide. Write a personal explanation of why you held bitcoin, what you want your beneficiaries to do with it, and any guidance for working with the Digital Asset Adviser. Do not leave this blank.*

- Beneficiary Personal Message and Education Guide printed and stored with estate documents**  
*Replace any earlier draft with the completed version.*

## 6. FINAL CROSS-CHECKS

*Before booking your signing appointment, verify consistency across all documents.*

- Stack labels are identical in Digital Asset Inventory and Letter of Wishes**  
*Open both documents side by side. Check every label character-for-character.*
- Testamentary trust vesting age is the same in the Will and Letter of Wishes (Optional)**  
*Both should show the same age. If different, update the Letter of Wishes — the Will controls.*

- Executor name and spelling is consistent across all documents**  
*Even minor differences (e.g. 'Rob' vs 'Robert') can create administrative friction.*
- All optional clauses in the Will are either completed or deleted — no placeholder text remains**  
*Search the document for '[' to find any remaining placeholders.*
- Executor has been contacted and has agreed to act**  
*They do not need to be present at signing, but must be aware they are named.*
- Digital Asset Adviser has been briefed on their role**  
*Remind them: they have no legal authority under the Will. Their role is practical — to assist the Executor with technical recovery.*

## 7. SIGNING CEREMONY

*Do not proceed until all sections above are fully checked. Use your separate Signing Ceremony Checklist on the day.*

- Two witnesses identified — neither is a beneficiary or spouse of a beneficiary**  
*Both witnesses must be 18 or older and present simultaneously with you.*
- Signing date and location confirmed with witnesses**  
*All three of you must be physically present in the same room throughout the ceremony.*
- All documents to be signed brought to the ceremony**  
*Will (all pages). Do not bring the Technical Roadmap to the signing.*
- Signing Ceremony Checklist printed and on hand**  
*Use it to step through the ceremony in sequence. Do not rely on memory.*

## 8. AFTER SIGNING — STORAGE & HANDOVER

- Original signed Will stored in a secure, known location**  
*Fireproof home safe, solicitor's strongroom. Your Executor must know where it is.*
- Technical Roadmap stored separately — different location to the Will**  
*Never co-locate the Will and the Technical Roadmap.*
- Executor told where the original Will is stored**



**Digital Asset Adviser told how to contact the Executor (and vice versa)**

**Digital copies of non-sensitive documents backed up (Optional)**  
*Will, Digital Asset Inventory, Letter of Wishes - scanned PDF or cloud copy. Not the Technical Roadmap.*

**Annual review date set — same date next year**  
*Use the Annual Review Worksheet to check your documents each year.*

## COMPLETION SIGN-OFF

NAME

DATE SIGNED

NEXT REVIEW DUE

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