**Cryptocurrency Holdings & Access Information Template**

*Important: This form contains sensitive data. Store securely and only share with authorized individuals such as your estate attorney, executor, or trustee.*

**1. Client Information**

* **Full Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Email Address:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Phone Number:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2. Crypto Exchange / Wallet Details - Account #1**

* **Exchange / Wallet Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Website or App Used:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Type (Centralized Exchange, DeFi Wallet, Cold Wallet, etc.):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Account Number / User ID:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Password:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **2FA Enabled? (Y/N):** \_\_\_\_\_\_\_
* **2FA Method (App/Phone/Key):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Seed Phrase / Recovery Words:**
*Write down the exact words in order. Usually 12, 18, or 24 words.*

**Assets in Account – you can attach a “Current Assets Held in Account” report from each crypto exchange in place of listing each one out here**

| **Type of Cryptocurrency** |  **Ticker Symbol** |  **Approximate Quantity** |  **Approximate Value (USD)** |
| --- | --- | --- | --- |
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|  |  |  |  |

* **Total Estimated Value:** $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Special Instructions for Executor or Trustee**

**3. Notes for Estate Planner / Executor**

* **Has this information been shared with the executor/trustee?** Yes / No
* **Where is the physical copy stored? (safe, lockbox, etc.):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Does this account use any external hardware (e.g., Ledger, Trezor)?** Yes / No
	+ If Yes, where is the device stored? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Any known tax liabilities or reporting issues tied to this account?**

**NFT Holdings**

* **Platform / Marketplace Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Wallet or User ID:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Password or Access Key:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**List of NFTs Held**

| **NFT Name** |  **Collection** |  **Token ID** |  **Approx. Value (USD)** |
| --- | --- | --- | --- |
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**Special Instructions for NFTs**

**DeFi Platform Participation**

* **Platform Name (e.g., Uniswap, Aave):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Wallet Address Used:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Password or Access Key:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Assets and Actions Taken**

| **Type of Token** |  **Protocol** |  **Quantity** |  **Actions (Staked, Borrowed, etc.)** |
| --- | --- | --- | --- |
|  |  |  |  |
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**Special Instructions for DeFi Assets**