THE BITCOIN ACCUMULATION STRATEGY QUICK-START CHECKLIST

Your Complete Action Plan on One Page

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PHASE 1 — FOUNDATION (Before You Buy Another Satoshi)

Your Starting Point

- Completed the 5-question self-audit from the Introduction
- Identified which failure mode describes your last 12 months: emotional buying / paralysis during dips / decision fatigue
- Acknowledged your existing holdings as a starting point, not a mistake

Your First Automated Buy (Chapter 2 — Do This First)

- Chosen a platform for your recurring buy
- Set up an automated weekly purchase (even $25 counts)
- Confirmed the first scheduled buy is active
- Written the buy amount, platform, and day in one place

Your Position Size (Chapter 4)

- Completed the net worth snapshot
- Scored your risk tolerance honestly
- Calculated your target Bitcoin allocation as a percentage of net worth
- Written your target allocation number down in your plan

PHASE 2 — PRACTICAL SETUP (Your System, Running)

Your Platform (Chapter 5)

- Evaluated your current platform against the five criteria: fees, Bitcoin-only vs. multi-coin, auto-invest, withdrawal limits, regulatory reliability
- Confirmed your platform has the lowest fee structure for your buy size

- Noted the annual fee cost at your buy amount — and compared it to a lower-fee alternative

Your Schedule (Chapter 6)

- Chosen weekly as your default frequency (or written the reason for a different choice)
- Set Monday as your default buy day (or written the reason for a different day)
- Confirmed automation is active — not manual, not dependent on remembering
- Set your quarterly review date in your calendar

Your Crash Protocol (Chapter 7)

- Written what you will do if Bitcoin drops 30%
- Written what you will do if Bitcoin drops 50%
- Written what you will do if Bitcoin drops 70%
- Identified your Fear & Greed Index acceleration threshold (default: below 20 for 3 consecutive days)
- Written your pre-approved acceleration amount in dollars
- Named one person you will call instead of selling

Your Custody Threshold (Chapter 8)

- Decided your custody threshold (default: $10,000 on-exchange)
- Noted whether your current position is above or below that threshold
- If above: scheduled the hardware wallet transfer with a specific date
- If below: written the date you will revisit custody readiness
- Hardware wallet status: purchased / set up / seed phrase backed up / test transfer completed

Your Records (Chapter 9)

- Created your transaction log (spreadsheet or app)
- Logged every existing purchase: date, USD amount, BTC received, price per BTC, platform, fee
- Chosen your accounting method: FIFO / HIFO / Specific Identification
- Set up Koinly or CoinTracker (or noted when you will)
- Set a recurring Monday reminder to log each week's buy

PHASE 3 — ADVANCED DECISIONS (Written Before You Need Them)

Your Windfall Protocol (Chapter 10)

- Defined "small windfall" for your situation and written what you will do with it
- Defined "medium windfall" and written your split-entry schedule

- Defined "large windfall" and written your pre-deployment checklist requirement
- Written your salary increase protocol (what % goes to increasing DCA)

Your Cycle Awareness (Chapter 11)

- Marked your own purchase dates on the cycle calendar
- Identified which cycle phase your first purchase fell in
- Confirmed you understand that your DCA strategy does not change based on cycle phase

Your Pre-Commitment Contract (Chapter 12)

- Completed all three parts of the pre-commitment contract
- Ticked all six items in the prohibited list
- Signed and dated the contract
- Photographed it and saved it to your phone
- Named your accountability partner

Your Exit Philosophy (Chapter 13)

- Chosen your philosophy type: Core Holder / Milestone Seller / DCA-Out
- Written your core position floor in BTC or dollar value
- Written at least one life event trigger with a defined sell amount
- Committed to holding every lot a minimum of 12 months before selling
- Named a CPA consultation threshold for any significant sale

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PHASE 4 — YOUR COMPLETE PLAN (The Deliverable)

Your Personal Bitcoin Accumulation Plan (Chapter 14)

- Completed all eight sections of the plan
- Signed and dated the plan
- Photographed the completed plan
- Saved the photo to your phone's home screen or a dedicated album
- Set your 90-day review reminder in your calendar

Your Next Step (Chapter 15)

- Answered the five 90-day review questions (or set the date to return and do so)
- Identified your single largest current gap
- Written the answer to Question 5: what do you need to learn or do next?

THE ONE RULE THAT GOVERNS ALL THE OTHERS

A strategy that isn't written isn't a strategy. The plan in your head is the plan you'll abandon when the market gets hard.
