

RESOURCE 1: QUICK-START CHECKLIST

The Complete Self-Custody System — One Page

BITCOIN SELF-CUSTODY MASTER CHECKLIST

Pin this to your wall. Check each box only when the task is physically done — not when you intend to do it.

Download the printable version at: [YOUR LANDING PAGE URL]

PHASE 1: FOUNDATION

Complete before touching your hardware wallet

- Audit your holdings** — List every place you currently hold Bitcoin. Label each: (a) truly mine, (b) exchange-held, (c) unknown.
 - Enable exchange 2FA** — Switch from SMS to an authenticator app (Google Authenticator or Authy). Do this today, regardless of where you are in the setup.
 - Set up a dedicated email** — Create a new email address used only for Bitcoin-related accounts. Do not use your main email.
 - Read Chapter 2** — Understand what your hardware wallet does and doesn't do before you open the box.
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PHASE 2: DEVICE SETUP

One session, uninterrupted, no phone camera out

- Inspect the box** — Confirm packaging is sealed. No pre-written seed phrase inside. No instructions asking you to use pre-generated words.

Download companion software — Ledger Live from ledger.com only. Trezor Suite from trezor.io only. Never from a search result link.

Initialize the device — Follow on-screen prompts. Choose "Set up as new device." Never "Restore."

Create your PIN — 6–8 digits. Not your birthday. Not 123456. Write it somewhere physically secure.

Record your seed phrase — 24 words. In order. In pen. On paper. On the device screen only — never typed into a computer or phone.

Verify every word — Check each word against the device screen before closing the setup. No guessing. No assumptions.

PHASE 3: FIRST TRANSACTION

Proves the device works before you move real money

Generate a receiving address — On the device. Verify it appears identically on your device screen and in the software.

Send \$10 test transaction — From your exchange to your new wallet address. Triple-check the address before confirming.

Confirm receipt — Wait for confirmation. Verify the balance appears correctly in Ledger Live or Trezor Suite.

Complete First Transaction Record — Record the wallet address and transaction ID. Store physically.

PHASE 4: SEED PHRASE SECURITY

The most important 30 minutes of this entire process

Write Copy 1 — All 24 words, numbered, in ink.

Write Copy 2 — Identical second copy. Same pen. Verify word by word.

Store Copy 1 — Fireproof home safe or bank safe deposit box.

- Store Copy 2** — Separate physical location. Different building from Copy 1.
 - Confirm: no digital copies exist** — No photo. No note app. No cloud storage. No email.
 - Confirm: device and seed phrase are in different locations** — Never stored together.
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PHASE 5: FULL MIGRATION

Only after the recovery test is complete

- Run the recovery test first** — See Phase 6. Do not skip this.
 - Check network fees** — Migrate during a low-fee period. Check mempool.space.
 - Withdraw in stages** — 10% first. Confirm receipt. Then the remainder.
 - Triple-Check Rule on every transaction** — Address verified on device screen → in paste field → on confirmation screen.
 - Post-flight checklist** — Zero balance confirmed on exchange. Correct balance confirmed on hardware wallet.
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PHASE 6: RECOVERY TEST

This is what separates real self-custody from assumed self-custody

- Reset the device to factory settings**
 - Select "Restore from recovery phrase"**
 - Enter all 24 words from your written backup — in order**
 - Verify wallet addresses match your First Transaction Record**
 - Verify balance is correct**
 - Log the test** — Date completed. Result (pass/fail). Any issues noted.
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■ PHASE 7: EXTENDED SECURITY

Builds the complete system around your foundation

- Scam Defense Playbook reviewed** — Six threat types understood. Countermeasures in place.
 - Backup level confirmed** — Matches your current holding size per the Decision Tree in Ch. 8.
 - Passphrase decision made** — Proceed or continue without. If proceeding: enabled, tested, stored separately.
 - Annual Maintenance Calendar created** — Four tasks. Recurring reminder set. Same date each year.
 - Second hardware wallet ordered** — Different brand. Initialized. Balance verified to match. Stored in second location.
 - Bitcoin Access Document completed** — Sealed. Stored with or near will. Trusted person informed it exists.
 - Self-Custody Principles Card** — Printed or photographed. Kept with hardware wallet.
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■ ANNUAL MAINTENANCE (Every Year — Same Date)

- Recovery test completed and logged
 - Firmware updated via official software only
 - Both seed phrase backup locations physically verified
 - Bitcoin Access Document reviewed and initialed
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ALL ITEMS COMPLETE — *Date:* _____

You are now in the top tier of Bitcoin holders by security practice. Most people never do this. You did