

BONUS RESOURCE 1

Quick-Start Checklist

Your Complete Self-Custody Action Plan — One Page, Every Step

Pin this page to your wall. Work through it in order. Tick every box. When all 15 sections are complete, your Bitcoin is secured.

PHASE 1 — FOUNDATION (Chapters 1–3)

- Complete the 5-dimension Risk Audit (Chapter 1). Score each dimension honestly.
- Verify your hardware wallet arrived sealed, with tamper-evident packaging intact.
- Generate your seed phrase using only the hardware wallet's onboard screen — never a computer or phone.
- Write all 24 words by hand, in order, using the recovery card provided with your device.
- Verify every word against the device screen before the device powers off.
- Complete the Misconception Quiz (Chapter 3). Correct any false beliefs before proceeding.

PHASE 2 — SECURE STORAGE (Chapters 4–6)

- Choose your backup medium using the 3-question Decision Tree (Chapter 5).
- Transfer your seed phrase to your chosen medium (paper, steel plate, or titanium).
- Destroy the original handwritten card after transferring — do not keep two paper copies.
- Identify two geographically separate storage locations using the Location Audit (Chapter 6).
- Place one backup at Location A and one backup at Location B. Confirm neither location shares a risk zone.
- Hardware wallet stored separately from both backups — never in the same location.

PHASE 3 — SECURITY HARDENING (Chapters 7–9)

- Complete the Disclosure Audit (Chapter 7). Identify everyone who knows you hold Bitcoin.
- Decide whether a passphrase is appropriate using the 6-Factor Readiness Assessment (Chapter 8).
- If passphrase activated: store it at a third separate location, not with either seed backup.
- Run the Recovery Dry-Run using the 12-step checklist (Chapter 9). Confirm your backup works.
- Record your first verification date and first receiving address for future checks.

PHASE 4 — ADVANCED & ONGOING (Chapters 10–15)

- If holdings exceed \$100,000: review the Multisig Readiness Checklist (Chapter 10).
- Complete the Inheritance Instruction Template (Chapter 11). Give a copy to your trusted executor.
- Complete the My Security Plan template (Chapter 14). Store with your Letter of Instruction.
- Set your annual security review date in your calendar now. Block 2 hours. Make it recurring.
- Run the 20-point Annual Review each year — or after any major life event.

YOUR ANNUAL REVIEW DATE: ___ / ___ / _____

FIRST RECEIVING ADDRESS (first 12 chars): _____

LAST BACKUP TEST DATE: ___ / ___ / _____ **RESULT:** PASS / FAIL