

# Bitcoin Estate Planning Standards 2025

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## Executive Summary - Cold Outreach Version

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**KEEP Standards Commission**

*Professional-Practice Consistency Framework*

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### The Crisis We Face

American families now hold over **\$210 billion in Bitcoin**<sup>1</sup>, yet fewer than **one in five** have proper inheritance plans for these digital assets<sup>2</sup>. Unlike traditional investments held by banks or brokers, Bitcoin exists only as cryptographic keys. Lose the keys, lose the Bitcoin forever.

This creates four critical risks for estate planning practitioners:

- **Malpractice Exposure:** Attorneys face potential liability for lost or inaccessible Bitcoin assets
- **Regulatory Uncertainty:** Unclear IRS guidance on crypto estate valuations and reporting
- **Client Confusion:** Inconsistent advice across practitioners on Bitcoin custody and inheritance
- **Professional Gaps:** Limited training and resources for traditional estate planning professionals

**KEEP is vendor-neutral, built in collaboration with ACTEC Fellows and Big-Four crypto-tax directors**—unlike custodial 'kits' tied to a single wallet company.

## The KEEP Framework Solution

K Keep it Secure	E Establish Legal Protection	E Ensure Access	P Plan for the Future
Multi-signature custody, hardware security, backup protocols	Trust/will integration, fiduciary compliance, regulatory alignment	Beneficiary verification, emergency procedures, inheritance protocols	Annual reviews, technology updates, succession planning

## Economic Upside in Two Client Files

- **Average premium Bitcoin Heir Package** billed by early adopters: **\$12,500**
- **KEEP licence** = \$25,000
- **Licence covered after 2 files**; every file thereafter  $\approx$  **90% margin**
- **One botched Bitcoin probate** can spark \$250,000+ in legal fees and damages; KEEP cuts that risk to near-zero

**Risk Mitigation:** • Malpractice protection through standardized procedures • Professional liability coverage through industry best practices • CLE credit for standards training and implementation

**Business Development:** • Competitive differentiation in growing market • Premium pricing for specialized expertise • Professional recognition as early adopter

### \*\*🎯 Peer-Review Invitation\*\* \*\*\$3,000 HONORARIUM • 2-HOUR MEMO • FRONT-PAGE CREDIT\*\*

The Standards undergo rigorous peer review by: • ACTEC Fellows and past presidents • Big Four accounting firm crypto directors • Boutique estate planning practitioners with crypto experience • Academic experts in digital asset law

**Current Review Opportunity:** • 2-hour professional-practice consistency memo • \$3,000 honorarium + front-page credit • Minimal time commitment, maximum industry visibility

## Implementation Timeline

**Q1 2025:** Standards finalization and peer review

**Q2 2025:** Professional training and certification programs

**Q3 2025:** Industry adoption and template distribution

**Q4 2025:** Regulatory engagement and formal recognition

## Next Steps

**Immediate Action Required:** Join the peer review panel to shape the first nationwide Bitcoin inheritance standards and establish your firm as a thought leader in this emerging field.

→ [Request the 60-page draft here](#)

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### Contact Information

KEEP Standards Commission

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<sup>1</sup> Coin Metrics "BTC Float-Adjusted Market Cap, 24 Jun 2025"

<sup>2</sup> Fidelity Digital Assets Investor-Insights Survey, Feb 2024