

LITTLE SHARD — BITCOIN SELF-CUSTODY “SOURCE OF TRUTH”

(Encrypted text file. Copy/paste, fill in, then store in your preferred encrypted vault.)

Self-custody isn't "set and forget." This template helps you create a single encrypted file that tracks your setup, your recovery readiness, and what must change when life changes—without ever writing down spendable secrets. Fill it out in 10 minutes, store it in your encrypted vault, and update it quarterly so your Bitcoin stays recovery- and inheritance-ready.

RULES (read this first):

- ☐ Do NOT write seed words, private keys, or anything spendable
- ☐ Store this file encrypted (password manager secure note / encrypted vault)
- ☐ Update after any life change (move, new phone, marriage/divorce, kids, trustee change)

Owner (legal name): _____

Preferred name: _____

Jurisdiction: _____

Created: _____ Last updated: _____

Version: _____

Next scheduled review: _____ Next annual drill: _____

PART 0 — THE RHYTHM (HOW THIS STAYS ALIVE)

Update immediately if: move / new phone / marriage-divorce / kids / trustee change / death in family.

Quarterly (15 minutes):

- ☐ Confirm you can access signing devices
- ☐ Confirm backup locations still valid + reachable
- ☐ Confirm contact list + roles still correct
- ☐ Confirm security updates/firmware plan

Annual (60–90 minutes):

- ☐ Full recovery drill (simulate lost device)
- ☐ Review whether multisig is now appropriate
- ☐ Review legal alignment (trust/will/entity) with counsel
- ☐ Refresh documentation + rotate any stale assumptions

PART 1 — KEY MANAGEMENT (SECURE THE ASSET)

Setup type: [] Single-sig [] Multisig [] Hybrid [] Not sure

Approx holdings range (optional): [] <100k [] 100–500k [] 500k–2M [] 2M+

Signing devices (NO secrets—just inventory + status):

Device #1: Brand/Model _____ Purpose _____

Stored where: _____ Last checked: _____

Device #2: Brand/Model _____ Purpose _____

Stored where: _____ Last checked: _____

Backup method: ☐ Seed ☐ Shards ☐ Other: _____

Backup location #1: _____ Location #2: _____

Last backup verification date: _____

PART 2 — LEGAL PROTECTION (OWNERSHIP + DOCUMENT ALIGNMENT)

Ownership structure: ☐ Individual ☐ Trust ☐ LLC/Entity ☐ Other: _____

Trust / Will status: ☐ Have trust ☐ Have will ☐ In progress ☐ None yet

Attorney/Firm: _____ Phone/Email: _____

CPA/Firm: _____ Phone/Email: _____

PART 3 — CONTINUITY (MONITOR + ASSESS “DECAY”)

Last full recovery drill: _____ Type: ☐ Partial ☐ Full

Drill result: ☐ Pass ☐ Issues found

PART 4 — PROFESSIONAL TEAM (WHO DOES WHAT, WHEN)

Your “continuity captain”: _____

Technical support contact: _____

NEXT STEP (FOR \$500K+ HOLDERS): SELF-CUSTODY CONTINUITY AUDIT

Walk away with a completed Little Shard + a prioritized fix plan (including single-sig vs multisig guidance) and a trust/will alignment checklist you can share with your CPA/attorney.

Request an audit [link/QR]