



DIGITAL ASSET INVENTORY WORKSHEET

Organize Cryptocurrency, Digital Assets, Accounts & Records
For Estate Planning, Tax Preparation, Probate and Financial Planning



IMPORTANT SECURITY NOTICE: Do NOT record seed phrases, private keys, wallet passwords, PIN numbers, recovery codes, or authentication codes on this worksheet. This document should identify what exists and where related records can be found — not contain credentials that could give someone direct control over digital assets.

1. OWNER INFORMATION

Name: _____
Date Completed: _____
Last Updated: _____
Prepared With / Professional Contact: _____
Attorney / Estate Planner: _____
CPA / Tax Professional: _____
Financial Advisor: _____
Executor / Trustee, if applicable: _____

2. CENTRALIZED EXCHANGE ACCOUNTS

List cryptocurrency exchanges or custodial platforms where you currently hold — or previously held — digital assets.

Exchange / Platform	Account Email or Username	Assets Held	Approx. Value	Still Active?	Records Location
				☐ Yes ☐ No	
				☐ Yes ☐ No	
				☐ Yes ☐ No	
				☐ Yes ☐ No	
				☐ Yes ☐ No	
				☐ Yes ☐ No	

Examples may include Coinbase, Kraken, Gemini, Binance, Crypto.com, Robinhood, or other cryptocurrency platforms.

3. SELF-CUSTODY WALLETS

List wallets that you control directly. Public wallet addresses may be recorded. Do not record private keys or seed phrases.

Wallet Name / App	Blockchain	Public Wallet Address	Assets Held	Approx. Value	Access Instructions Stored Where?

Examples may include MetaMask, Phantom, Trust Wallet, Exodus, Cryptosense Wallet, or other self-custody wallets.

4. HARDWARE WALLETS

List physical cryptocurrency storage devices. Do not record the PIN, seed phrase, or recovery phrase here.

Device / Brand	Assets or Blockchains Used	Device Location	Approx. Value	Separate Access Instructions Exist?
				☐ Yes ☐ No
				☐ Yes ☐ No
				☐ Yes ☐ No

Examples may include Ledger, Trezor, KeepKey, or other hardware wallets.

3. CRYPTOCURRENCY & DIGITAL ASSET SUMMARY

Asset	Ticker	Approx. Quantity	Where Held	Approx. Value	Cost Basis Available?
Bitcoin	BTC				☐ Yes ☐ No
Ethereum	ETH				☐ Yes ☐ No
					☐ Yes ☐ No
					☐ Yes ☐ No
					☐ Yes ☐ No
					☐ Yes ☐ No

Estimated Total Digital Asset Value \$ _____ Valuation Date: _____

6. STABLECOINS

Do you own or use stablecoins? ☐ No ☐ Yes If yes:

Stablecoin	Blockchain	Quantity	Where Held	Approx. Value
USDT				
USDC				

7. NFTs & TOKENIZED ASSETS

Do you own NFTs or other tokenized digital assets? ☐ No ☐ Yes If yes:

Asset / Collection	Blockchain	Wallet or Platform	Approx. Value	Records Location

8. DeFi, STAKING & OTHER BLOCKCHAIN ACTIVITY

Check any activities that apply.

- ☐ Staking
- ☐ Decentralized exchanges
- ☐ Liquidity pools
- ☐ Crypto lending
- ☐ Borrowing
- ☐ Yield farming
- ☐ DeFi protocols
- ☐ Perpetual/futures trading
- ☐ Token bridging
- ☐ Mining
- ☐ Validator activity
- ☐ Other: _____

Platform / Protocol	Blockchain	Type of Activity	Assets Involved	Approx. Value

9. CRYPTO-RELATED BUSINESS OR INCOME

Have you received cryptocurrency through any of the following?

- ☐ Employment compensation
- ☐ Independent contractor payments
- ☐ Business payments
- ☐ Mining
- ☐ Staking rewards
- ☐ Airdrops
- ☐ Gifts
- ☐ Inheritance
- ☐ NFT sales
- ☐ Trading
- ☐ Other: _____

Notes:

10. COST BASIS & TAX RECORDS

Where are cryptocurrency tax and transaction records maintained?

- ☐ Exchange statements
- ☐ CPA / tax professional
- ☐ Cryptocurrency tax software
- ☐ Spreadsheet
- ☐ Accounting software
- ☐ Email records
- ☐ Paper files
- ☐ Cloud storage
- ☐ Other: _____

Cryptocurrency Tax Software Used: _____

Location of Historical Transaction Records: _____

Years Reported on Tax Returns: _____

Are cost-basis records complete? ☐ Yes ☐ No ☐ Partially ☐ Unknown

11. BANK & PAYMENT CONNECTIONS

List financial institutions commonly used to fund crypto purchases or receive proceeds.

Bank / Financial Institution	Acct. Last 4	Connected Platform	Notes

12. DIGITAL ASSET RECORD LOCATIONS

Email Accounts Used: _____

Devices Used: ☐ Mobile ☐ Laptop ☐ Desktop
☐ Tablet ☐ Hardware Wallet
☐ Other: _____

Location of Exchange Statements: _____

Location of Tax Records: _____

Location of Wallet Records: _____

Location of Estate Access Instructions: _____

13. AUTHORIZED OR TRUSTED CONTACTS

Primary Trusted Contact
Name: _____
Relationship: _____
Phone / Email: _____

Professional Contact
Name: _____
Role: _____
Phone / Email: _____

Does this person know where access instructions are stored? ☐ Yes ☐ No

Do not provide seed phrases or private keys in this section.

14. ESTATE PLANNING STATUS

Addressed in estate plan? ☐ Yes ☐ No ☐ Partially ☐ Unsure

Does executor know assets exist? ☐ Yes ☐ No

Written instructions exist? ☐ Yes ☐ No

Discussed with estate-planning professional? ☐ Yes ☐ No

Beneficiaries identified? ☐ Yes ☐ No ☐ Partially

15. ASSETS OR ACCOUNTS THAT MAY BE MISSING

Do you believe additional assets may exist? ☐ No ☐ Yes ☐ Unsure If yes or unsure, explain: _____

Possible clues (check all that apply):

- ☐ Bank transfers
- ☐ Old accounts
- ☐ Unknown addresses
- ☐ Hardware wallets
- ☐ Tax records
- ☐ Exchange emails
- ☐ Mobile apps
- ☐ Previous purchases
- ☐ Other: _____

16. PROFESSIONAL REVIEW NOTES

Estate Planning Issues: _____

Tax / Cost-Basis Issues: _____

Assets Requiring Documentation: _____

Blockchain Analysis Needed? ☐ No ☐ Yes ☐ TBD Reason: _____

17. DIGITAL ASSET INVENTORY REVIEW

I understand that this worksheet is intended to identify and organize digital assets and related records. I have not included seed phrases, private keys, wallet passwords, authentication codes, or other credentials capable of directly accessing cryptocurrency in this worksheet.

Prepared by: _____

Date: _____ Next Review Date: _____

KEEP THIS INVENTORY CURRENT

- ☐ Annually
- ☐ After opening a new account
- ☐ After significant purchases
- ☐ After changing estate documents
- ☐ After a major life event
- ☐ When changing professionals

