



12 Crypto Questions to Ask Every Estate-Planning Client

Use this worksheet to identify, document, and discuss digital assets during estate-planning intake.



This worksheet is for educational and organizational purposes only. It can help guide your conversations and ensure nothing important is overlooked. It is not legal, tax, investment, or estate-planning advice.

1

Have you ever purchased or received cryptocurrency?

☐ Yes ☐ No ☐ Unsure



Notes: _____

2

Do you have accounts with cryptocurrency exchanges?

☐ Yes ☐ No ☐ Unsure



Notes: _____

3

Do you store cryptocurrency outside of an exchange?

☐ Yes ☐ No ☐ Unsure



Notes: _____

4

Have you ever transferred cryptocurrency to a personal wallet?

☐ Yes ☐ No ☐ Unsure



Notes: _____

5

Do you own a hardware wallet?

☐ Yes ☐ No ☐ Unsure



Notes: _____

6

Have you participated in staking, DeFi, or other blockchain activities?

☐ Yes ☐ No ☐ Unsure



Notes: _____

7

Do you own NFTs or other tokenized digital assets?

☐ Yes ☐ No ☐ Unsure



Notes: _____

8

Have you received cryptocurrency as income or compensation?

☐ Yes ☐ No ☐ Unsure



Notes: _____

9

Where are your cryptocurrency records and tax documents maintained?



Notes: _____

10

Have you used multiple blockchains or cryptocurrencies?

☐ Yes ☐ No ☐ Unsure



Notes: _____

11

Does anyone you trust know that these assets exist?

☐ Yes ☐ No ☐ Unsure



Notes: _____

12

Have you created a plan for what should happen to your digital assets if you become incapacitated or pass away?

☐ Yes ☐ No ☐ Unsure



Notes: _____



Follow-Up Notes



Recommended Next Steps

