Veritas
BITCOIN STRATEGIES

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ESTATE PLANNING BRIEFING

Before You Draft: 12 Questions for Every Bitcoin Client

Many Bitcoin holders chose Bitcoin so that no institution would control it. A trust drafted without understanding that may be signed and never funded. These questions belong in the conversation before the first draft.

ASK BEFORE YOU DRAFT

WHAT THEY HOLD

1. What do you hold: Bitcoin, other digital assets, ETFs?
2. What share of your net worth is it?
3. Have you borrowed against or lent any of it?

HOW IT IS HELD

4. Where is it held today: exchange, custodian, brokerage, device, or multisig?
5. Who can move it, and is there a single point of failure?
6. Are there passphrases or wallets only you know about?

WHAT THEY WANT

7. Should your heirs keep it, or may a trustee sell it?
8. Will you allow an institution to hold the keys?
9. Is this wealth meant to last for generations?

PEOPLE AND RECORDS

10. Who do you trust to hold a key or act if you cannot?
11. Who knows it exists today, and who should know after your death?
12. Do you have records of what you paid, and when?

KNOW THE CLIENT

Control over convenience. Many distrust third-party custody after the 2022 exchange failures.

A long horizon. Many never intend to sell and want heirs to keep holding.

Concentrated by design. Default diversification rules work against them.

Private. Some have not told a spouse, children, or advisers what they hold.

HOW THE ANSWERS SHAPE THE TRUST

"My heirs should never sell."
Diversification waiver and express authority to hold Bitcoin.

"No bank touches my keys."
Directed trust, individual special trustee, or collaborative multisig.

"This is for many generations."
Dynasty structure with key succession built in.

"Nobody knows it exists."
A secure access memorandum before anything else.

Eric Runge works alongside estate counsel as the Bitcoin specialist on the planning team. Schedule a 15-minute call: calendly.com/veritas-007/strategic-capital-allocation-call-15-mins

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