

POSITION CLARITY · ORGANIZE

What My Family *Needs to Know*

A plain-language note for the people you trust: that you hold crypto, where the records are, and who to call. It carries no secrets. You fill it in and keep it.

What exists

Where to look

Who to call

No secrets

Position Clarity

A private template. Made in Canada.

A private record you fill in and keep yourself.
Position Clarity never sees, requests, or stores any of it.

So the people you trust are not left guessing.

Crypto is easy to hold and easy to lose track of, especially for someone who did not set it up. This note tells your family the plain facts: that it exists, where the records are, and who can help. It deliberately holds no passwords and no recovery words.

THE RULE THIS NOTE RUNS ON

Do not write any recovery phrase, private key, or password here. This note points your family to the records and the people who can help, not to the secrets. Access to the secrets should be arranged separately, through an executor or lawyer. Position Clarity never sees this note.

The plain facts, in your words.

Yes, I hold crypto. A rough sense of what and how much, so it is not a surprise.

In plain terms, what I hold

The records are here. Point to the custody map and the inventory.

Where my records are kept

Access is arranged through these people. Do not go looking for secrets. Call them first.

Trusted person

Accountant or CPA

Lawyer or executor

One warning that matters. Anyone who phones, emails, or messages asking for recovery words or passwords is a scammer, even if they say they are helping. Never send them.

Anything else I want them to know

THE BOUNDARY, IN PLAIN TERMS

You fill this in and keep it. Position Clarity never sees, requests, or stores it. Keep it with your will and important papers, and make sure the right person knows it exists. It pairs with the custody map and the seed phrase inventory.

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Educational and organizational only. This template helps you leave a clear, private note. It is not legal, estate-planning, tax, or financial advice, and it does not replace a will, a lawyer, or an executor. Set up access and estate arrangements with qualified professionals. Position Clarity never asks for or stores seed phrases, private keys, or passwords.

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