

POSITION CLARITY · ESTATE & ACCESS KIT

Prepared for *Jordan's* setup

A personalized companion to the free Crypto in Your Estate guide, built around the exchanges and wallets you actually use. It records the setup, the access recovery model, and what to document for each, so a trusted person could follow it. It never asks for a seed phrase, private key, or password.

Kraken

Shakepay

Ledger Nano S / X

MetaMask

Position Clarity

Personalized. Made in Canada.









YOUR SETUP

What you use, and how it is reached

Here is your setup as one picture, the same Access Map a Review uses. Each item points to what its access depends on, with a marker where one thing alone stands in the way. Colour is who can reach it, never good or bad.

THE ACCESS MAP

From each holding to what its access depends on. Could a trusted person follow it?

 Kraken Exchange account	-----	Access depends on the account login, and the company staying reachable	
 Shakepay Exchange account	-----	Access depends on the account login, and the company staying reachable	
 Ledger Nano S / X Hardware wallet	-----	Access depends on the device, and a recovery backup kept safe	
 MetaMask Software wallet	-----	Access depends on the device, and the recovery backup	

Your access at a glance. Gold is self-custody, where you hold the keys. Oxblood is custodial, where a company does. The markers are explained where each item appears. This describes your setup, it does not tell you to change it.

THE PRINCIPLES

The four that do not change

These hold for any setup. The sections after them apply each one to the specific exchanges and wallets you use.

Backup. More than one durable copy of any recovery material, in more than one place, with at least one fully offline, and tested at least once. The words themselves are never a photo or a cloud note.

Documentation. A calm record of what you hold and where it lives, and that recovery backups exist and roughly where. Never the secrets that control them.

Succession. A trail a trusted person can follow, arranged so the right person can act when needed. A will points to where access is arranged, it never contains the keys.

Security. A few steady habits. No one ever needs your recovery words. Treat urgency as a warning sign. Most transfers cannot be reversed. Keep the records private.

SECTION 01

Kraken

Setting it up

Kraken is a custodial exchange, which means it holds the crypto for you. You open an account with an email and a password, then protect it with two-factor authentication, a second login step that is usually a code from an app.

If access is ever lost

Because it is custodial, there is no recovery phrase. Access is recovered through Kraken itself, using your registered email and identity verification, alongside your two-factor method. The email and the two-factor backup matter most.

What to document

The email address tied to the account.

Which two-factor method you use, and where its backup codes are kept (the location only, never the codes themselves).

A note that the crypto is custodial, so access depends on the account, not on a recovery phrase.

A link to Kraken's official support page for current recovery steps.

Operates in Canada through Payward Canada, Inc., registered as a restricted dealer with the Canadian Securities Administrators and as a money services business with the Financial Transactions and Reports Analysis Centre of Canada (FINTRAC), and listed on the CSA register of platforms authorized to do business with Canadians. Confirm current recovery steps on the official support pages: <https://support.kraken.com/>

SECTION 02

Shakepay

Setting it up

Shakepay is a Canadian custodial mobile app, so it holds the crypto for you. You sign in with your phone number or email, secured with the app's verification.

If access is ever lost

Access is recovered through Shakepay support, with identity verification, usually tied to the phone number on the account.

What to document

The phone number or email tied to the account.

Which device the app is installed on.

A link to Shakepay's official support contact, and a note that it is custodial.

A Montreal-based, Canada-only platform. Shakepay is a CICO investment dealer member. Confirm current recovery steps on the official support pages: <https://help.shakepay.com/>

SECTION 03

Ledger Nano S / X

Setting it up

Ledger is a hardware wallet, a small device that keeps your keys offline. You set it up with the Ledger Live app, and the device generates a recovery phrase, a list of words, that you write down. A PIN protects the physical device.

If access is ever lost

The recovery phrase restores the wallet onto any compatible device. The PIN only protects that one physical device. Whoever has the recovery phrase controls the funds, which is why it is never typed into a website or shared with anyone.

What to document

That a recovery backup exists, and its general location, never the words.

That the PIN is memorized or stored separately from the recovery backup.

Which coins or apps are on the device.

A link to Ledger's official support page.

The Nano S is an older model with limited capacity. Newer models are the Nano S Plus and Nano X. The recovery model is the same across them. Confirm current setup and recovery steps on the official support pages: <https://support.ledger.com/>

SECTION 04

MetaMask

Setting it up

MetaMask is a software wallet you add to a browser or phone. It creates a Secret Recovery Phrase when you set it up, and it works with Ethereum and similar networks.

If access is ever lost

The recovery phrase restores the wallet into MetaMask or any compatible wallet. It is typed only into the wallet itself, never into a website, a form, or a support chat.

What to document

That a recovery backup exists, and its general location, never the words.

Which networks and accounts you use.

A reminder that the phrase is never entered on a website or given to support, since that is always a scam.

Confirm current setup and recovery steps on the official support pages: <https://support.metamask.io/>

YOUR PRIMARY TIER

Where most of it sits

You noted your primary storage as Cold (hardware wallet).

A self-custody wallet on a dedicated offline device. The keys stay off the internet, and the device signs transactions itself.

THE WORKSHEETS THIS PAIRS WITH

Where Your Crypto Lives, a custody map. The Seed Phrase Inventory, which records existence and location only. The Emergency Access Checklist, a trail for a trusted person. What My Family Needs to Know. All free, all filled in and kept by you.

THE BOUNDARY, STATED PLAINLY

This does not replace a lawyer, an executor, an accountant, or an advisor. It helps you arrive prepared, with your records in order and the right questions ready. Position Clarity never sees, requests, or stores your records, and never asks for a seed phrase, private key, or password.

Educational and organizational only. This Kit explains principles and helps you organize private records around the products you use. It is not legal, estate-planning, tax, or financial advice, and it is not a substitute for a lawyer, an executor, an accountant, or an advisor. Position Clarity never asks for or stores seed phrases, private keys, or passwords.