

POSITION CLARITY · ORGANIZE

Where Your *Crypto Lives*

A custody map: one calm record of what you hold and where it sits, across exchanges, wallets, and accounts. It records locations, never secrets. You fill it in and keep it.

Asset

Location

Account

Custody

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.

A map of where things are, not the keys to them.

Most people's crypto is scattered: a bit on an exchange, a bit in a wallet, maybe an ETF in a registered account. A custody map is one page that says what you hold and where it lives, so nothing is forgotten and a trusted person could follow it later.

Custodial. Someone else holds the keys, such as an exchange. Your access depends on that platform.

Self-custody. You hold the keys yourself, in a wallet you control. Wallets and Custody explains the full spectrum.

WHAT THIS SHEET NEVER RECORDS

Never write a recovery phrase, private key, or password on this map. It records where things are and how access is meant to work, never the secrets that unlock them. Position Clarity never sees this sheet.

What you hold, and where it lives.

One row per holding. Approximate amounts are fine. The point is the picture, not precision.

ASSET	ROUGHLY HOW MUCH	WHERE IT LIVES	CUSTODIAL OR SELF-CUSTODY	ACCOUNT

"Where it lives" is the platform or wallet, for example a named exchange or a hardware wallet. "Account" is the wrapper it sits in, for example a TFSA, an RRSP, or a personal account.

The places, and how access is meant to work.

List the platforms and wallets you use. Record how access works in principle, never the credentials themselves.

PLATFORM OR WALLET	TYPE	HOW ACCESS IS MEANT TO WORK (NOT THE CREDENTIALS)

For "how access is meant to work," write the method, for example "logs in with my email and an app code" or "hardware wallet, recovery backup in the safe." Never the password, the app codes, or the recovery words.

THE BOUNDARY, IN PLAIN TERMS

You fill this in and keep it. Position Clarity never sees, requests, or stores it. Keep this map with your important documents, and tell only the people who would genuinely need it.

Educational and organizational only. This template helps you keep a private record. It is not investment, financial, tax, legal, cybersecurity, or estate-planning advice, and it does not tell you what to buy, sell, hold, or report. For decisions about your own situation, consult qualified professionals. Position Clarity never asks for or stores seed phrases, private keys, or passwords.