

The Self-Custody Checklist

A step-by-step path from exchange to self-custody. Print it, check it off, keep it. Free forever, share it with anyone.

1 Before You Start

- Know why you're doing this.** Self-custody protects you from exchange failure, censorship, and seizure. FTX users lost \$8B in a weekend.
- Assess your holdings.** Know roughly how much Bitcoin you're securing.
- Clear 1-2 hours** of uninterrupted time.
- Secure environment.** Private location, no cameras, nobody watching over your shoulder.

2 Acquiring Hardware

- Choose your signing device.** Research options: Coldcard, SeedSigner, Blockstream Jade, Trezor.
- Buy direct from the manufacturer or an authorized reseller.** Never secondhand, never Amazon or eBay.
- Verify package integrity.** Check tamper-evident seals and signs of opening.
- Cross-reference serial numbers** where the manufacturer supports verification.

3 Setup

- Update firmware first**, before generating any keys. Verify the update is authentic.
- Generate a new seed phrase** using the device's random number generator.
- Write down the seed phrase** on paper, in order, clearly.
 - Pen, not pencil. Double-check every word. Verify the word order.
- Set a device PIN.** Memorable to you, not obvious to anyone else.
- Optional: add a passphrase** for an extra security layer (advanced users).

4 Back Up Your Seed Phrase

- Make at least 2 copies** stored in different locations.
- Upgrade to steel.** Fire, flood, and time destroy paper. Stamped metal survives all three.
- Store securely.** Safe, safety deposit box, or a hidden location you control.
- Never digital.** No photos, no cloud storage, no password managers, no notes apps.
- Distribute geographically.** Different locations protect against local disasters.

5 Test Recovery (Do Not Skip)

- Before moving any funds**, prove you can recover from your written seed.
- Wipe the device completely.**
- Recover from your written seed phrase.**
- Verify the addresses match.** Generate a receiving address and confirm it is identical to the one before the wipe.
- This step is mandatory.** More Bitcoin has been lost to untested backups than to hackers.

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6 First Transaction

- Start small.** Move \$50-100 first.
- Generate the receiving address on your hardware device**, not just in software.
- Verify on the device screen.** The address on the device must match the address you send to.
- Withdraw from the exchange** to your verified address.
- Wait for confirmation.** 1 confirmation for small amounts, 6 for larger.
- Confirm the funds arrived** in your wallet.

7 Move Everything

- After the test succeeds**, move the remaining funds off the exchange.
- Verify every transaction.** Don't rush. Check addresses character by character at start and end.
- Keep the exchange account for buying** if you need it, but never for storage.

8 Ongoing Security

- Periodically verify** you can still access your wallet.
- Keep firmware updated**, verifying authenticity of each update.
- Check backups annually.** Confirm seed phrase copies are readable and where you left them.
- Re-check physical security** of every storage location.

9 Inheritance Planning

- Tell one trusted person** that the Bitcoin exists. Funds nobody knows about die with you.
- Document the access process** in clear instructions.
- Test the instructions.** Could your family follow them without you in the room?
- Consider multisig** for larger holdings (advanced; this is what Butlers are for).

If you think you made a mistake

- Don't panic. Most mistakes are recoverable.
- Stop. Don't send more transactions.
- Verify your seed phrase backup.
- Get expert help before acting.

Never do these

- Enter your seed phrase on any website
- Share it with anyone, including "support"
- Photograph or screenshot it
- Store it on a computer, phone, or cloud
- Use a device that arrived "pre-configured"

Phase	Key action	Done
1	Understand why	<input type="checkbox"/>
2	Buy hardware direct from the manufacturer	<input type="checkbox"/>
3	Generate seed + PIN on device	<input type="checkbox"/>
4	Back up seed in multiple locations	<input type="checkbox"/>
5	Test recovery	<input type="checkbox"/>
6	First small transaction, verified on device	<input type="checkbox"/>
7	Move remaining funds	<input type="checkbox"/>
8	Ongoing security routine	<input type="checkbox"/>
9	Inheritance plan, tested	<input type="checkbox"/>

Your keys. Your coins. Your responsibility. Your freedom. Stuck on any step? A Butler will walk you through it live:

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