SURE Detailed Analysis Template

	Security	Usability	Resiliency	Efficiency
Goals				
Quick Analysis				
Keys & Codes				
Places				
People				
Current Plan				

SURE Evaluation Form from *Cryptoasset Inheritance Planning* by Pamela Morgan, Esq.

Device	Software	Assets	Backup	Password	Backup 2	Password

Cryptoasset Inventory Form from *Cryptoasset Inheritance Planning* by Pamela Morgan, Esq.

Tech Helper's Name	2+ Years	Good Teacher	Trust-worthy	Independent	Total

Double Check That You've Included:

Helpers (names, contact information, photos if possible)

Devices (your phone, computer, hardware wallets, paper wallets)

Wallets (all of the software you use to access your assets)

Assets (include a list of assets)

Exchanges (be sure you've listed all of the exchanges that are holding funds for you)

Access (the information they'll need to find your storage locations and all necessary access codes)