DataPatrimony
BY CHAINCOMPLY

FOR NOTARIES AND THEIR OFFICES

Crypto in the estate, with its record already in the file.

What DataPatrimony gives your office, how a client can engage through you, and what happens on the day of the handover.

In short

- ✓ A reviewed Source-of-Wealth record, prepared while the holder is alive.
- ✓ The case reference, the key and the handover letter lodged with you, alongside the will.
- ✓ No referral fees, in either direction.

What changes in the estate

When an estate includes crypto, heirs often arrive with a seed phrase or a custodian statement, and no history. The bank asked to credit the proceeds must establish their Source of Wealth. Without a record, the estate waits while the history is rebuilt from fragments, often by specialists the family pays for.

What your office receives

A record you can rely on
A reviewed file that traces each position to its origin, with any open point named and quantified.

A letter written for you
The handover letter is written so that a notary who has never heard of DataPatrimony knows exactly what to do.

The keyholder's role
The case reference and the key can be lodged with you. Nothing about the handover needs to be held by ChainComply.

A case desk for the heirs' bank
Once the record is delivered, the case desk answers the bank's questions on it, directly or through your office.

What the record contains

- ✓ A statement of the Source of Wealth, with the evidence attached.
- ✓ An audit report a compliance officer can read in an hour.
- ✓ The reconciliation of exchanges, blockchain and bank statements, in annexes.
- ✓ A case reference, so that the heirs' bank can confirm with the case desk that the record is authentic and unchanged.

Two ways a client can engage

A client who does not want their identity known to ChainComply can engage through your office under a code name. Professional secrecy makes the notary the natural intermediary: you hold the only record of who sits behind the case reference.

	CLIENT ENGAGES DIRECTLY	THROUGH YOUR OFFICE
Who signs the engagement	Your client	Your office
Who pays	Your client	Your office, on your client's behalf
Who knows the client's identity	DataPatrimony, kept apart from the data	Only your office
Who holds the key	Your client, or your office	Your office
Who acts on the trigger	Your office, with the reference and key	Your office

Four steps with your office

1 **Introduce**
You raise it with clients planning a succession, or a client brings it to you.

2 **Engage**
Your client engages directly, or through your office under a code name.

3 **Lodge**
The case reference, the key and the handover letter are lodged with you, alongside the will.

4 **Hand over**
On the trigger, you contact the case desk. The record is refreshed and delivered to you or to the heirs' bank.

Next to each other, never a commission

ChainComply pays no referral fees and asks for none. Your fees are your own, the engagement is with your client, and your independence stays exactly where your professional rules put it.

What DataPatrimony does not do

- ✓ Give legal or tax advice.
- ✓ Draft wills or deeds.
- ✓ Hold keys, seed phrases or assets.
- ✓ Contact a client you introduced, without you.

The office briefing, thirty minutes

1. **How the record is built**
   What a reconstruction covers and what the finished record looks like. Ten minutes.
2. **The handover letter and the key**
   What is lodged with you, and what to do on the day. Ten minutes.
3. **The intermediary route**
   How a client engages through you without ChainComply learning who they are. Five minutes.
4. **Your questions**
   Five minutes, or longer if you need it.

Arrange a briefing for your office, in person or by video, at **datapatrimony.com**.