Crypto allocation worksheet (PDF)

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Fill in with your own numbers. Nothing here is a recommendation.

Step 1: the whole picture

Total investments across all accounts ($) _____

Emergency fund, kept outside crypto ($) _____

Current crypto value, all exchanges and wallets ($) _____

Current crypto share (%) _____

Step 2: the loss test

Largest portfolio loss I could accept (%) _____

Crypto share x 0.8 (loss if crypto falls 80%) _____

Is that within my limit? (yes / no) _____

Step 3: inside the crypto slice

Asset	Value ($)	Share of crypto (%)	Cap I set (%)

Step 4: rules

- [ ] Target share and rebalancing band written down
- [ ] Rebalance dates or trigger chosen
- [ ] No borrowed money or leverage in this slice
- [ ] Review date set in my calendar

Sources: FRED: Coinbase Bitcoin (CBBTCUSD); FRED: Coinbase Ethereum (CBETHUSD); SEC Investor.gov: Crypto assets; SEC Investor.gov: Diversify your investments; SEC Investor.gov: Risk tolerance. Full explanation and links: https://uxs.nz/crypto/how-much-of-my-portfolio-should-be-in-crypto/

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