FIELD GUIDE 01 / FOUNDATIONS / FREE EDITION

Crypto. Start with control.

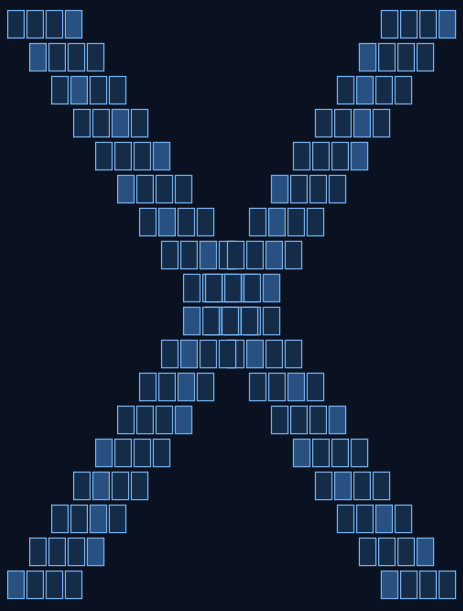
Understand what you own, protect access and check the details before your first transfer.

IN THIS GUIDE

01 Wallets & custody

02 Security & permissions

03 Your first research checklist



Independent thinking starts with a clear process.

Educational material. No investment recommendation or promise of returns. Crypto can lose all its value.

FIELD GUIDE 01 / 01 / UNDERSTAND

Five things. Different roles.

Learn these distinctions before moving money.

ASSET

What you hold

BTC, ETH or a token. A familiar ticker alone does not verify a token.

NETWORK

Where it exists

A transfer uses a particular blockchain. The receiving service must support that asset on that network.

WALLET

How you interact

Software or a device helps manage keys and sign actions. On-chain balances are recorded on the network.

ADDRESS

Where it is received

A receiving identifier. It can be shared, but on public networks it may expose transaction history.

RECOVERY

How control is restored

Many self-custody wallets use a recovery phrase. Custodial and smart-account recovery can work differently.

First exercise: Write the asset, network and custody provider for one asset you are researching. Do not write any secret keys here.

References: [1], [2], [5], [8]. Links on pages 9-10.

FIELD GUIDE 01 / 02 / CUSTODY

Who controls the keys?

Choose deliberately. Convenience and responsibility come with different trade-offs.

CUSTODIAL ACCOUNT

A provider holds the keys.

You access the account through its login and recovery process. You depend on the provider for withdrawals and operational continuity. Provider failure can put assets at risk.

SELF-CUSTODY

You control access and recovery.

You authorize transactions yourself. You must protect the recovery method and verify what you sign. Losing access or exposing secrets can mean losing funds.

A hardware wallet is a signing device.

It can keep private keys isolated from an online computer. It cannot make a harmful transaction safe after you approve it. Learn the device and its recovery process before using it.

Decision check: Who can authorize a withdrawal? Who can help with recovery? What happens if the provider fails, the device is lost or the backup is damaged?

References: [1], [2].

FIELD GUIDE 01 / 03 / ACCESS

Secure the way in.

Start with the email account that controls your other logins.

- [ ] **Use unique passwords.**

  Use a reputable password manager for service logins. Do not reuse your exchange or email password.

- [ ] **Enable stronger authentication.**

  Use phishing-resistant MFA such as a FIDO security key or supported passkey where available. Keep recovery options protected.

- [ ] **Keep recovery secrets private.**

  For a seed-based wallet, follow the provider's verified backup instructions. Avoid screenshots, chat messages and cloud notes for the phrase.

- [ ] **Verify the real app and domain.**

  Start from a known official address. Ads, lookalike domains and private messages are not proof of identity.

- [ ] **Plan for loss before it happens.**

  Know the official recovery process. Store the backup safely against theft and physical damage. Do not improvise a home-made seed cipher.

Your task today

Complete an account-security check without transferring money. Never type a real recovery phrase into this guide, a form or a message.

References: [2], [3], [7], [10].

FIELD GUIDE 01 / 04 / TRANSFERS

Slow down before Send.

This checklist is for on-chain transfers. Provider requirements can differ.

- [ ] **Asset and network match.**

  Confirm the exact asset, network and receiving platform support. Matching-looking addresses do not establish compatibility.

- [ ] **Destination is verified.**

  Check the full destination using a trusted source and the device confirmation screen. Include a memo or tag if the recipient requires one.

- [ ] **Amount and fees are understood.**

  Check the amount the recipient will receive, the withdrawal fee and any network fee or minimum deposit.

- [ ] **You know what is being signed.**

  Read the confirmation. Stop if the wallet displays unexpected permissions or an action you cannot explain.

- [ ] **A small test is considered.**

  For an unfamiliar destination, a small test can catch mistakes. Respect minimum deposits. A successful test is not a guarantee for later transactions.

Practice without spending

Write a mock transfer plan: asset, network, recipient type, required memo and estimated fees. Verify these details against the receiving service's own instructions.

References: [2], [8], [9].

FIELD GUIDE 01 / 05 / PERMISSIONS

Connecting is not approving.

A wallet connection and permission to spend tokens are different actions.

CONNECT

An app can request access.

Connecting can expose your public address and let an app request actions. A connection is not a certificate that the app is trustworthy.

APPROVE

A contract may receive spending permission.

Check the spender, token, network and spending limit. An unlimited allowance can put the approved token balance at risk.

DISCONNECT / REVOKE

Leaving a site may not remove permission.

Disconnecting a dapp does not revoke existing token approvals. Use verified wallet guidance to review and revoke allowances; on-chain revocation can require a fee.

Scenario: an urgent support message

Someone sends a link to "validate" your wallet and asks for your recovery phrase. Do not follow the link or share secrets. Reach the provider independently through its official support route.

References: [2], [4].

FIELD GUIDE 01 / 06 / RESEARCH

A ticker is not a thesis.

Before a price target, build a short evidence file.

- [ ] **Identify the asset.**

  Record the network and, for tokens, the verified contract address. Similar names can describe unrelated assets.

- [ ] **Explain the purpose.**

  What is the asset used for? Who needs it? Which claim can you verify in documentation or actual usage?

- [ ] **Understand the supply.**

  Check circulating supply, maximum supply where defined, issuance and unlocks. A low unit price does not mean a low valuation.

- [ ] **Ask how you could exit.**

  Look at spreads, order-book depth or pool liquidity. Market capitalization is not cash available to buy your position.

- [ ] **Write the opposing case.**

  What could fail? Which finding would change your mind? Record sources and dates, including disclosures of commercial interests.

Keep the scale honest: market cap = price x circulating supply. A stablecoin aims for a reference value; that aim is not a guarantee. Crypto-assets can become worthless.

References: [5], [6]. CIX research prompts are an editorial framework.

FIELD GUIDE 01 / 07 / YOUR CHECKLIST

Make the process yours.

Complete this with research notes only. Never record secrets.

ASSET / NETWORK / VERIFIED CONTRACT, IF APPLICABLE

WHO HOLDS THE KEYS? WHAT IS THE RECOVERY METHOD?

OFFICIAL SOURCE URLS AND DATE CHECKED

ONE CLAIM I VERIFIED / ONE THING STILL UNCLEAR

ONE REASON TO WAIT OR DECIDE AGAINST THIS ASSET

QUICK SELF-CHECK

1. Does a low coin price make it cheap?
2. Does disconnecting remove a token allowance?
3. Does a hardware wallet prevent every harmful signature?

Answers: 1. No: supply and other factors matter. 2. No: review approvals separately. 3. No: you still need to verify what you authorize.

Worksheet: original CIX educational exercise.

FIELD GUIDE 01 / SOURCES & EDITION

Check the sources.

Primary references for the factual guidance. Examples and worksheets are original teaching material.

[1] Ethereum.org | Wallets

Wallet roles, custody and recovery responsibilities.

Open the original source

[2] Ethereum.org | Security

Recovery phrases, verified addresses and signing precautions.

Open the original source

[3] CISA | Multifactor authentication

Stronger account authentication and phishing resistance.

Open the original source

[4] MetaMask | Token approvals

Spending allowances, disconnection and revocation.

Open the original source

[5] CFTC | Digital asset risks

Market, custody and operational risks.

Open the original source

About this edition

References continue on the next page. Links checked on 20 September 2026. Source links are provided for verification, not as provider endorsements.

FIELD GUIDE 01 / SOURCES & EDITION

Check the sources.

Primary references for the factual guidance. Examples and worksheets are original teaching material.

[6] Coinbase Learn | Market cap

The relationship between price and circulating supply.

Open the original source

[7] Trezor | Wallet backups

Backup privacy and the recovery process for seed-based wallets.

Open the original source

[8] Coinbase Help | Receiving crypto

Supported networks, receiving addresses and required tags.

Open the original source

[9] Coinbase Help | Destination tags

Recipient-specific memo requirements and small test transfers.

Open the original source

[10] CISA | Password managers

Unique passwords and password-manager use for account logins.

Open the original source

About this edition

Edition 1.0 - 20 September 2026. Newly written from the topics in the CIX learning archive, with current primary references. No affiliate links in this guide. Educational material, not personal financial advice.

FIELD GUIDE 01 / CONTINUE LEARNING

Think independently.
Learn together.

Next: read **Risk Before Reward** and practise sizing a hypothetical position before you consider placing a real trade.

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Compare evidence before forming a view.

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