

Learn the 5 Steps Process Minimise Risk  
& Maximise Returns in Cryptocurrency

Joe Shew - Crypto Consulting Institute

# CRYPTOCURRENCY INVESTMENT WORKBOOK

5-Step Process to Minimize Risk & Maximize Returns



# Welcome to Your Crypto Investment Journey

This workbook is designed to help you apply the 5 Pillar Investment Strategy presented by Joe Shew. By completing the exercises in this workbook, you'll develop a personalized cryptocurrency investment plan based on proven principles that have helped over 3,000 clients generate \$56 million in recorded profits.

Unlike most cryptocurrency education that focuses solely on technical analysis or get-rich-quick schemes, this workbook takes a holistic approach to building sustainable wealth. You'll learn not just what to buy, but how to think like a professional investor, manage risk effectively, and develop the psychological resilience needed to succeed in volatile markets.

## How to Use This Workbook:

- Complete each section thoughtfully - take your time
- Be honest in your self-assessments
- Refer back to this workbook regularly
- Update your strategies as you learn and grow
- Use this as your personal investment blueprint

## The Five Pillars You'll Master:

- **Pillar 1 - Asset Management:** Learn to secure your investments and protect your wealth with military-grade security practices
- **Pillar 2 - Data-Driven Decisions:** Master the art of reading markets through macro trends, technical analysis, on-chain data, and psychology
- **Pillar 3 - Asset Selection:** Discover how to choose the right cryptocurrencies based on your personal risk profile and goals
- **Pillar 4 - Investment Strategy:** Develop a clear, systematic approach to entering and exiting positions that removes emotion from the equation
- **Pillar 5 - Mindset:** Build the mental framework that separates successful investors from those who give up after the first setback

# Message from the CEO

Welcome – and thank you for being here today.

Most investors enter crypto with excitement but **without a clear plan**. They rely on headlines, hype, or luck – and **that rarely leads to consistent results**.

At Crypto Consulting Institute, **we believe wealth is built through education, strategy, and disciplined decision-making**.

**The 5 Pillars** you'll learn today are designed to help you manage risk first, think like a professional, and approach the market with clarity and confidence – not emotion.

**Use this workbook to follow along, take notes, and turn what you learn into action.** The more engaged you are, the better your results will be. **This workbook is a tool – but real progress comes from commitment and execution.**

The most successful CCI clients are those who **complete the exercises, apply the principles consistently, and revisit their plans over time.** **Whether you're starting with \$1,000 or \$100,000, the fundamentals remain the same.**

Small, consistent steps taken with the right guidance can create life-changing outcomes over time. **My goal today is to help you leave with clarity, confidence, and a plan you can trust.**

I'm excited to guide you through the process.

Warm regards,

Joe Shew  
Founder of CCI



200+ reviews on  Trustpilot 

# Why Are You Here Today?

*(Take a moment to pause and reflect before we begin).*

**What made you decide to attend this session today?**

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## What Do You Want to Get Out of This Session?

**If today is a success, what will be different for you when you leave?**

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# Bitcoin Mechanics: Why Timing Matters in Crypto Investing



## Stats

Total Bitcoins in circulation:	19,991,091
Total Bitcoins to ever be produced:	21,000,000
Percentage of total Bitcoins mined:	95.20%
Total Bitcoins left to mine:	1,008,909
Total Bitcoins left to mine until next blockhalf:	352,659
Bitcoin price (USD):	\$67,505.00
Market capitalization (USD):	\$1,349,498,572,640.63
Bitcoins generated per day:	450
Bitcoins generated per day after the next block halving event:	225

**Bitcoin isn't just another digital asset—it's programmed scarcity.** Unlike fiat currencies that governments can print endlessly, Bitcoin has a hard cap of 21 million coins. Ever. This countdown shows exactly when the next "halving event" occurs—a programmed reduction in Bitcoin's supply issuance.

## What These Numbers Mean:

The Countdown: Approximately 783 days until the next Bitcoin halving event (around 2027). This is when the block reward for miners gets cut in half, reducing new Bitcoin entering circulation.

## Why This Matters:

**Supply shock is predictable.** Historically, major price increases follow 12-18 months after halving events as reduced supply meets steady demand.

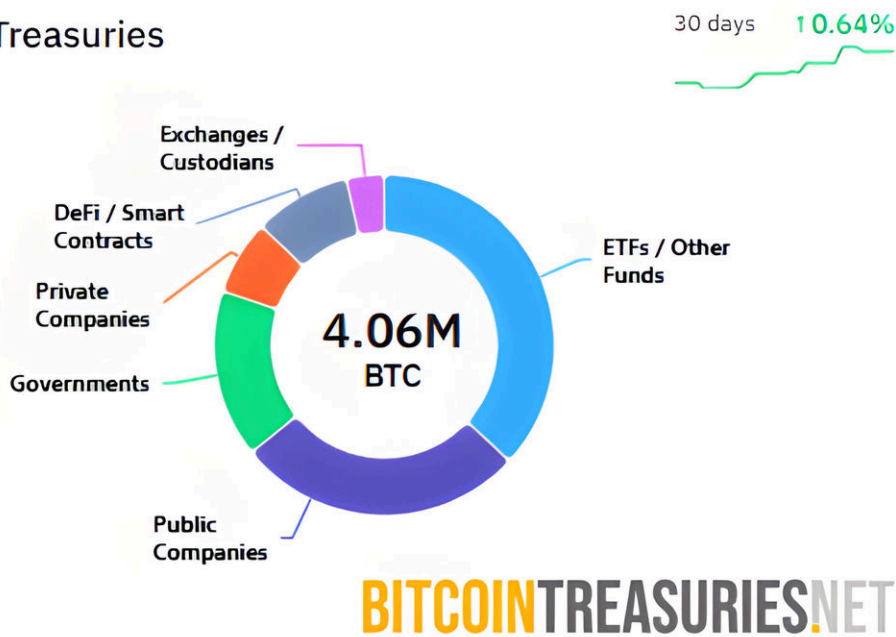
**The halving cycle is the #1 macro indicator in crypto.** It's mathematical certainty, not speculation.

**Strategic timing matters.** Sophisticated investors position themselves before halvings. With ~783 days until the next event, you're in the optimal accumulation window.

**The countdown is running.** Will you be positioned before the supply shock?

# Institutional Adoption: Who Owns Bitcoin?

## BTC in Treasuries



This pie chart reveals a critical shift in Bitcoin ownership. Over 4 million BTC are now held in treasuries by ETFs, public companies, governments, and private institutions. This represents a massive validation of Bitcoin as a legitimate asset class. When MicroStrategy, Tesla, and entire nation-states add Bitcoin to their balance sheets, they're making a statement: this is not a speculative fad, but a fundamental shift in how value is stored and transferred. The 'smart money' is positioning themselves for the next decade. The question is: will you?

**BTC HELD BY PUBLIC COMPANIES**

**1.136M** ↑ 2.3%

\$76.71B

**NUMBER OF PUBLIC COMPANIES**

**194**

**BTC PRICE**

**\$67,511** ↓ -26.5%

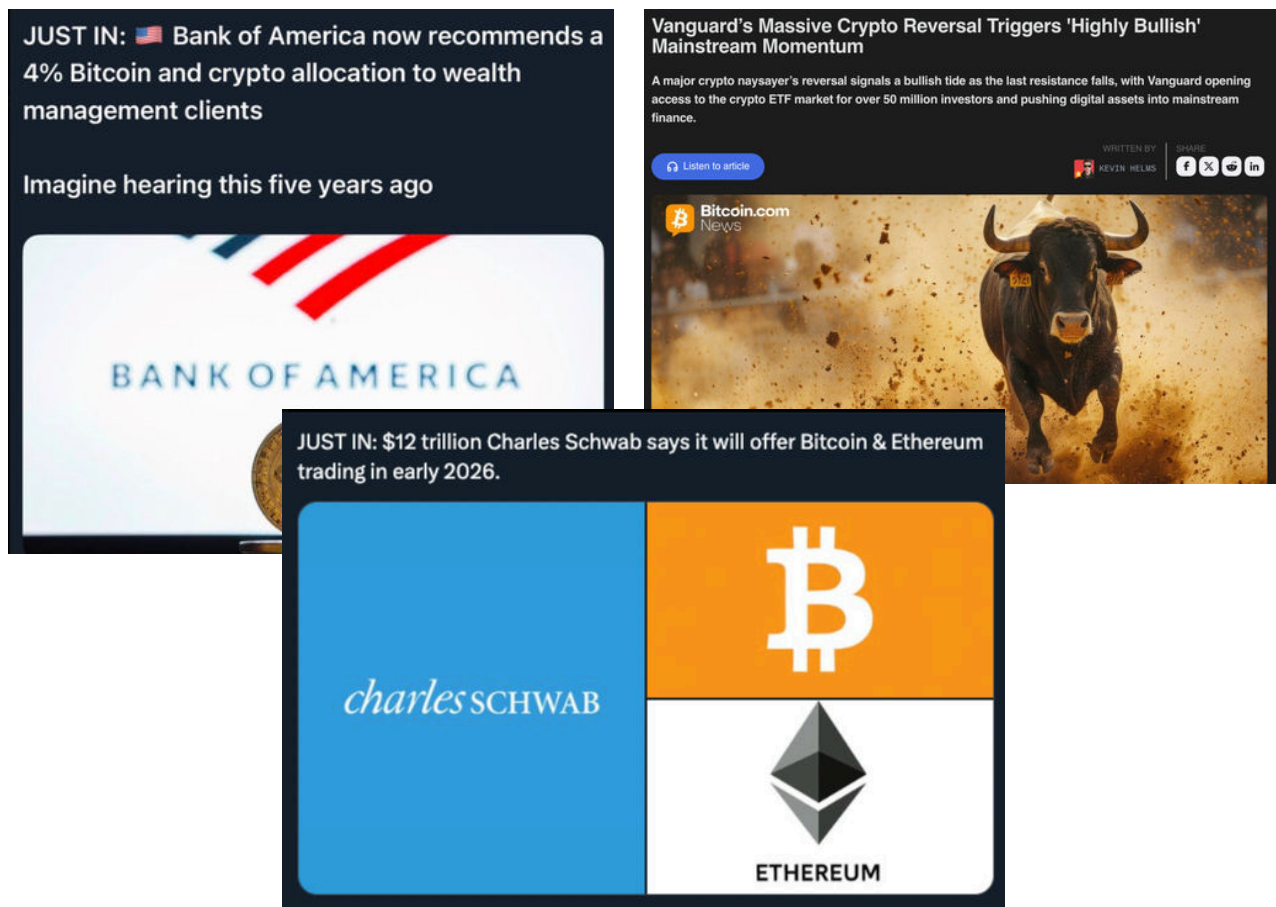
**ASSET DOMINANCE**

**95.0%**

● BTC 95.0% 
 ● ETH 4.2% 
 ● SOL 4.9% 
 ● BNB 3.3% 
 ● XRP 2.0%

Top 100 Public Bitcoin Treasury Companies			BITCOIN TREASURIES.NET			BITCOIN TREASURIES.NET			
Rank	Ticker	Bitcoin [mNAV] ↑	Rank	Ticker	Bitcoin [mNAV] ↑	Rank	Ticker	Bitcoin [mNAV] ↑	
1	MSTR	717,131 (0.97)	35	DDC	2,068 (0.55)	69	Prenetics	PRE	502 (2.23)
2	MARA	53,250 (1.00)	36	BITF	1,827 (9.44)	70	3U Holding AG	UUU	427
3	XXI	43,514 (0.75)	37	FUFU	1,780 (3.30)	71	Neptune Digital Assets	NDA	416
4	MPJPY	35,102 (1.34)	38	CANA	1,778 (20.44)	72	Virtu Financial, Inc.	VIRT	410
5	CEPO	30,021 (0.13)	39	NEXON	1,717	73	DMG Blockchain Solutions Inc.	DMGI	403
6	BLSH	24,300 (2.52)	40	EXOD	1,694 (2.99)	74	LM Funding America	LMFA	356 (3.08)
7	RIOT	18,005 (5.15)	41	FLD	1,526 (0.49)	75	Net Holding A.S.	NTHOL	352
8	COIN	15,389 (44.62)	42	CIFR	1,500 (37.44)	76	Consensus Mining & Seigniorage	CMSG	346 (3.49)
9	HUT	13,696 (6.83)	43	ANAP	1,417 (0.74)	77	Angel Studios, Inc.	ANGX	303 (27.69)
10	CLSK	13,513 (3.31)	44	RMXP	1,411 (2.30)	78	POP Culture Group Co., Ltd.	CPOP	300
11	ASST	13,132 (0.59)	45	TRSR	1,111	79	S-Science	5721	296
12	DJTI	11,542 (3.09)	46	H100	1,051	80	The9 Limited	NCTY	285
13	TESLA	11,509	47	ZOOZ	1,036 (0.06)	81	Bitplanet	049470	265
14	BLOCK	8,780 (53.11)	48	KULR	1,021 (1.57)	82	LQWD Technologies Corp.	LQWD	253 (1.62)
15	GDC	7,500 (0.43)	49	USBC	1,000 (0.04)	83	Coinshares International Limited	CS	236
16	GLXY	6,894 (37.43)	50	NA	1,000 (0.79)	84	WEMADE	112040	223
17	ABTC	6,039 (2.46)	51	BTDR	943 (34.00)	85	Rumble Inc.	RUM	211
18	NXTT	5,833 (0.02)	52	MSW	833 (0.22)	86	Parataxis Korea	288330	200 (3.49)
19	NAKA	5,398 (0.43)	53	YDKG	819 (0.42)	87	Vanadi Coffee, SA	VANA	200
20	BRR	5,000	54	SOS	803 (25.24)	88	BitMine	BMNR	192
21	GME	4,710 (39.91)	55	BTCT	769 (0.70)	89	Bitcoin Treasury Capital	BTBC	187
22	O434	4,091 (1.03)	56	FIGT	767	90	Consilium	COIN	182
23	EMPD	4,081 (0.58)	57	CVNO	763	91	Matador Technologies Inc	MATA	175 (3.06)
24	GEMI	4,002 (2.84)	58	AKER	754	92	The Broker Group	BTC	165
25	OBTC3	3,722 (0.82)	59	IMG	730 (0.13)	93	B HOLD	HOLD	161
26	CANG	3,645 (0.58)	60	SATS	620 (89.00)	94	FRMO Corp.	FRMO	159 (29.39)
27	ADE	3,605 (0.49)	61	CASH3	605	95	Sixty-Six Capital Inc	SIX	149
28	ALCPB	2,834 (1.40)	62	GPUS	589	96	K33 AB	K33	141 (3.06)
			63	MELI	570	97	BTCS S.A.	36C	138

## The Latest: Mainstream Momentum



Major financial institutions that once dismissed cryptocurrency are now embracing it:

- **Bank of America** now recommends a 4% Bitcoin and crypto allocation to wealth management clients
- **Charles Schwab** (\$12 trillion in client assets) announced Bitcoin & Ethereum trading for early 2026
- **Vanguard**, long a crypto skeptic, has reversed course, signaling highly bullish mainstream momentum.

When institutions managing trillions of dollars reverse their stance, it's not speculation—it's strategic positioning. The infrastructure is being built. The regulatory clarity is improving. The opportunity window won't stay open forever.

## The Parabolic Rise of Institutional Bitcoin Holdings



**This chart tells the most important story in cryptocurrency today: institutional adoption isn't coming—it's already here, and it's accelerating.**

The blue line represents institutional Bitcoin holdings tracked on Coinbase. Notice the pattern: relatively flat for years, then explosive parabolic growth starting in 2024. This isn't retail investors buying small amounts—this is billion-dollar institutions moving massive capital into Bitcoin.

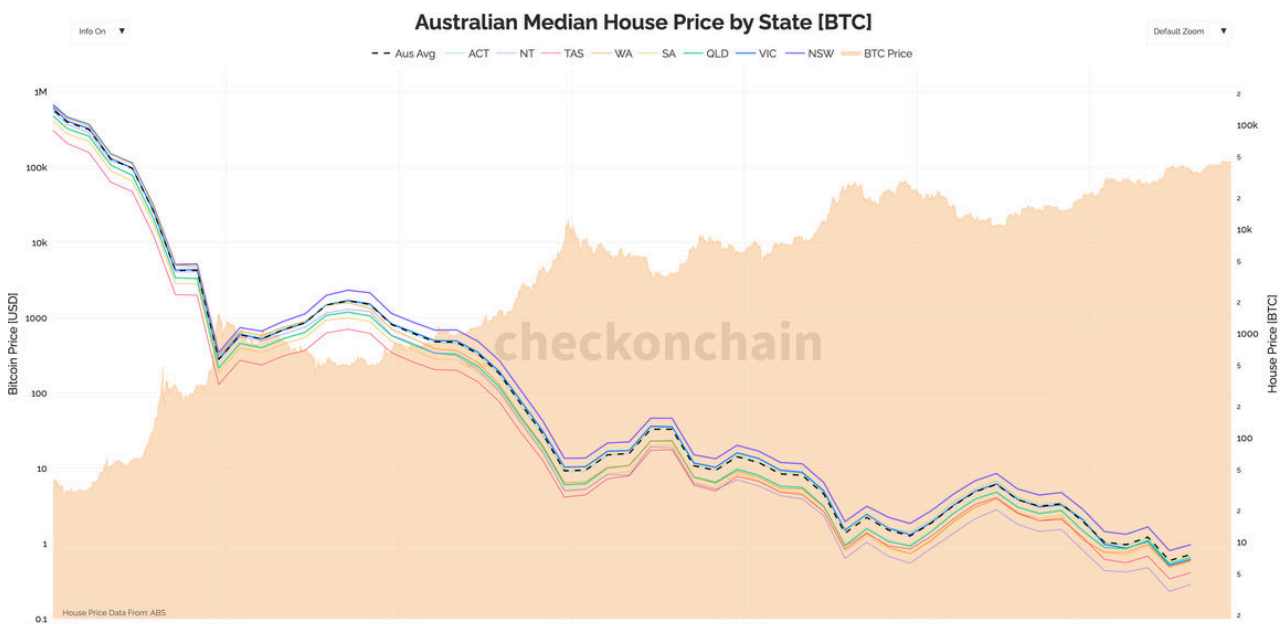
**The green and orange lines** show other major holders growing steadily, but nothing compares to the institutional surge. This is the "smart money" positioning themselves before the next major price movement.

**Historical context matters:** Notice the price chart (in red/candlesticks) underneath. Institutional accumulation often happens before major price runs, not during them. When institutions buy, they're thinking in decades, not days.

# The Cryptocurrency Opportunity

Before diving into your personal investment plan, let's examine the data that makes cryptocurrency one of the most compelling investment opportunities of our generation. These charts tell a powerful story about wealth creation, institutional adoption, and market maturation.

## The Purchasing Power Revolution



This chart shows how many Bitcoin were needed to purchase a median-priced home in Australia over time. In early 2013, it would have taken over 10,000 BTC to buy a house. By 2024, that same house costs less than 5 BTC. This dramatic shift illustrates Bitcoin's appreciation against real estate—one of the most stable asset classes. While property has been a reliable store of value, Bitcoin has outpaced it significantly, demonstrating why early adopters who held through market cycles have built substantial wealth.

**Reflection Question:** If Bitcoin continues this trend, what could your purchasing power look like in 5-10 years?

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## Bitcoin vs. Traditional Safe Haven Assets



Gold has been humanity's store of value for thousands of years. This chart compares gold's performance to Bitcoin since BTC's inception in 2010. The ratio (displayed in red/orange) shows how much gold you could buy with one Bitcoin. Despite significant volatility, the long-term trend is unmistakable: Bitcoin has dramatically outperformed gold. While gold has served as 'digital gold' for millennia, Bitcoin is emerging as a superior store of value for the digital age—more portable, more divisible, and verifiably scarce. This doesn't mean gold is obsolete, but it does show why many investors are allocating a portion of their 'safe haven' portfolio to Bitcoin.

**Key Insight: Bitcoin's volatility has decreased over time as the market matures and institutional adoption increases. What was once considered 'too risky' is now held by governments, corporations, and pension funds.**

# Understanding the Opportunity

## Exercise 1.1: Your Current Position

**Where are you right now in your crypto journey?**

- Complete beginner - never invested in crypto
- Dabbled a bit - made small purchases
- Active investor - regularly buying/selling
- Experienced - been through at least one market cycle

**What's your biggest challenge with cryptocurrency investing?**

(Check all that apply)

- Don't know where to start
- Overwhelmed by information
- Fear of losing money
- Don't understand the technology
- Following uninformed educators
- Making emotional decisions
- Speculating on random altcoins
- No clear investment strategy
- Missing opportunities
- Other: \_\_\_\_\_

## Exercise 1.2: Your Investment Goals

**What do you want to achieve with cryptocurrency investing?**

**Short-term goals (3-12 months):**

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**Medium-term goals (1-3 years):**

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**Long-term goals (3+ years):**

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**Financial target:** I want to build a portfolio worth \$ \_\_\_\_\_

**Timeline:** I want to achieve this by: \_\_\_\_\_

# PILLAR 1 – Asset Management

## The Foundation: Security & Confidence

**Key Principle: "Not your keys, not your crypto"**

### Exercise 2.1: Security Assessment

**Current security practices:** Rate yourself 1-5 (1=not at all, 5=completely secure)

Security Practice	Rating (1-5)
I store crypto on exchanges only	
I use a hardware wallet	
I have my seed phrases backed up	
My backups are stored securely	
I understand wallet security	
I can recognize scam attempts	
I have an inheritance plan for my crypto	

### Exercise 2.2: Security Action Plan

**Based on your assessment, what do you need to improve?**

**Priority 1 (Do immediately):**

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## Exercise 2.3: Scam Prevention Checklist

### I commit to the following security practices:

- Never share my seed phrases with anyone
- Verify all website URLs carefully
- Use 2-factor authentication
- Research before clicking links
- Never respond to unsolicited messages about crypto
- Use a hardware wallet for significant holdings
- Create a secure backup system
- Develop an emergency access plan for family

## Inheritance Planning:

Who should have access to your crypto if something happens to you?

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How will they access it securely?

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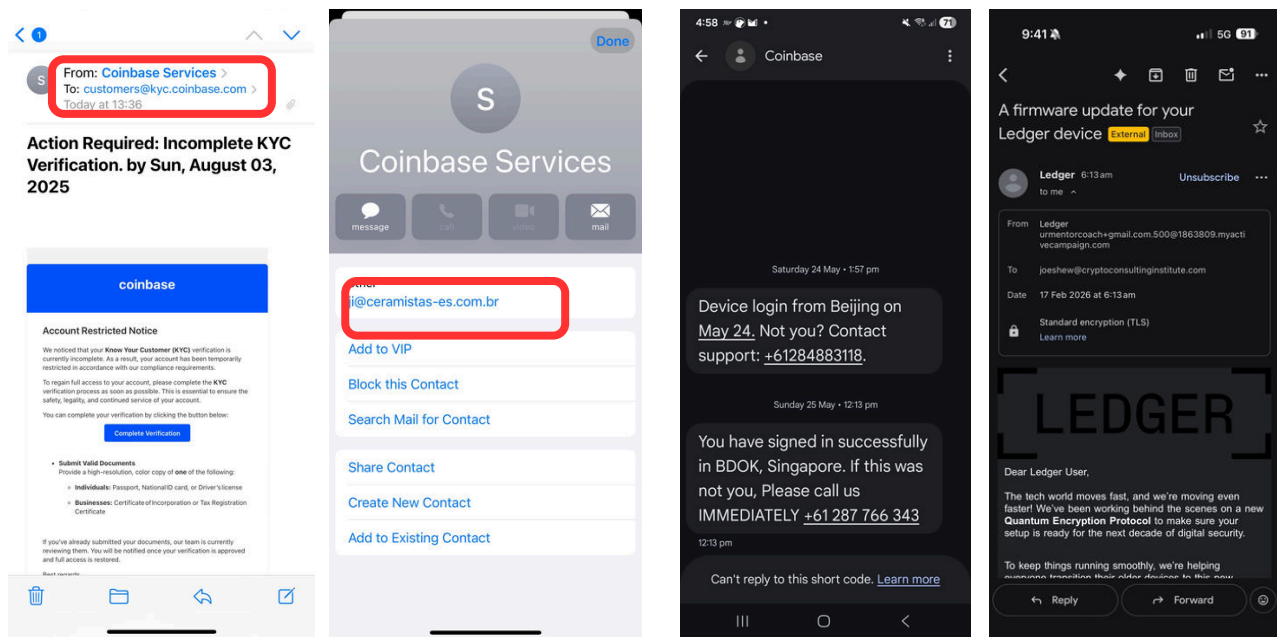
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# Sample Scams and Phishing



## With CCI Safety Protocol

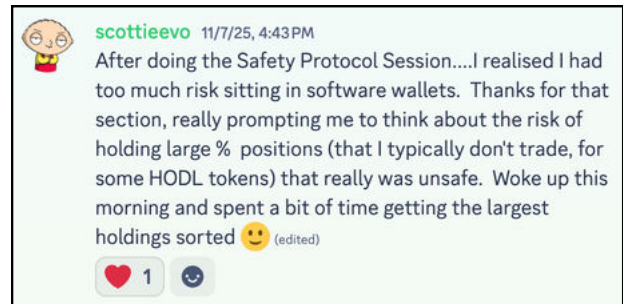
**RO Ronny**  
AU · 1 review



Thank you Joe for helping me to...

Thank you Joe for helping me to understand what crypto world is all about. You made this very simple and easy for me.

The course is amazing and the emphasis of **safety** is great. Highly recommend for someone who is looking into the Crypto world.



### What to watch for:

- Fake Coinbase emails with misspelled domains (kyc.coinbase.com vs real coinbase.com)
- Urgent language creating false deadlines ("by Sun, August 03, 2025")
- Unsolicited phone numbers in messages
- Contact information that doesn't match official sources

**Remember:** Legitimate crypto platforms will NEVER ask for your seed phrase, and they won't pressure you with urgent deadlines. When in doubt, go directly to the official website (type it yourself) rather than clicking links in emails or messages.

# PILLAR 2 – Data-Driven Decisions



## Exercise 3.1: Understanding Market Indicators

### Macro Factors I will monitor:

- Bitcoin halving cycles
- Federal Reserve policy
- Global economic indicators
- Institutional adoption news
- Regulatory developments
- Other: \_\_\_\_\_

### How often will I review macro factors?

- Daily  Weekly  Monthly  Quarterly

## Exercise 3.2: Technical Analysis Basics

### Which charts and indicators will I learn?

#### Essential (must learn):

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### Exercise 3.3: On-Chain Analysis

#### On-chain metrics I want to understand:

- Bitcoin/crypto held by institutions
- Exchange inflows/outflows
- Whale wallet movements
- Network activity
- Supply dynamics

### Exercise 3.4: Psychology Check

#### Avoiding Emotional Investing

##### When the market drops significantly, I tend to:

- Panic sell
- Hold steady
- Buy more (following my plan)
- Check my portfolio obsessively
- Trust my strategy

##### When the market pumps rapidly, I tend to:

- FOMO into random coins
- Take profits according to plan
- Get greedy and hold everything
- Follow the crowd
- Stick to my strategy

##### My emotional triggers:

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# Real Results: How Data-Driven Decisions Transform Lives



## How Rich Bull Went From Following YouTube Tips to Making His Own Investment Decisions

Rich Bull used to rely on YouTube videos and social media personalities for his investment decisions. After joining CCI, everything changed. He learned how to read markets, manage entries and exits, and trust his own judgment. "I'm just a lot more intuitive with my own decisions and actions now. That's probably the biggest takeaway."

AA Ash Ahmed  
AU • 3 reviews

Sep 26, 2025



Crypto investing and trading require a...

Crypto investing and trading require a serious and strategic approach, as it involves significant financial risk and market volatility. CCI distinguishes itself from other educational platforms by emphasizing both emotional intelligence—such as managing impulses and sentiments—and rigorous data-driven analysis, including technical and fundamental analysis. Notably, CCI offers regular video updates on market trends and insights every Monday, Wednesday, and Friday, which help members stay informed of real-time developments. The community aspect fosters active engagement and peer support, creating a collaborative learning environment. I highly recommend the VIP membership level due to its extensive coverage of foundational concepts like risk management and trading psychology, as well as intermediate topics such as pattern recognition and on-chain analysis, making it ideal for traders aiming to advance their skills.

Lawrence Wong  
HK • 1 review

Jun 15, 2024



A must-have partner and advisor in crypto education & consultation

I was first introduced to this team by its overseas affiliates a couple of years ago and was impressed by its practicality and down-to-earth approach. When that initial program had run its course I naturally signed up for CCI's core services. In spite of my prior experience in stocks and futures trading plus some experience in cryptos, there is constantly something newer and deeper to learn from this team. The weekly videos, updates and advices not only keep me afresh on the most important fundamentals, **technical** trends, targets and positions, etc. but also on the mentality side of trading such as awareness of the risks involved with impatience and overtrading, as well as emotional effects of market volatility or sentiment. Very worthwhile subscription!

These aren't just theories—they're proven strategies that work for real people. The members of the CCI community come from all walks of life: builders, corporate professionals, retirees, and everyday investors. What they have in common is a commitment to learning the right way to analyze markets.

**These members aren't special—they're simply educated, disciplined, and committed. You can be next.**

# PILLAR 3 – Asset Selection

## Choosing the Right Investments for Your Risk Profile

### Exercise 4.1: Risk Profile Assessment

Rate your agreement with each statement (1-5):

Statement	Rating (1-5)
I can handle significant portfolio volatility	
I have emergency funds outside of crypto	
I'm investing money I can afford to lose	
I prefer steady growth over massive gains	
I have a long time horizon (5+ years)	
I understand the projects I invest in	
<b>TOTAL SCORE:</b>	/ 30

**0-10:** Conservative investor – focus on Bitcoin and established projects

**11-20:** Moderate investor – blend of established and growth opportunities

**21-30:** Aggressive investor – can explore higher-risk opportunities

**My risk profile:** \_\_\_\_\_

### Exercise 4.2: Portfolio Allocation Strategy

Based on your risk profile, design your ideal allocation:

Asset Type	% Allocation	Specific Assets
Bitcoin	%	BTC
Large-cap (Ethereum, etc.)	%	
Mid-cap projects	%	
Small-cap/speculative	%	
Stablecoins/Cash	%	
<b>TOTAL</b>	<b>100%</b>	

### Exercise 4.3: Asset Research Template

For each cryptocurrency you consider investing in, complete:

**Project Name:**

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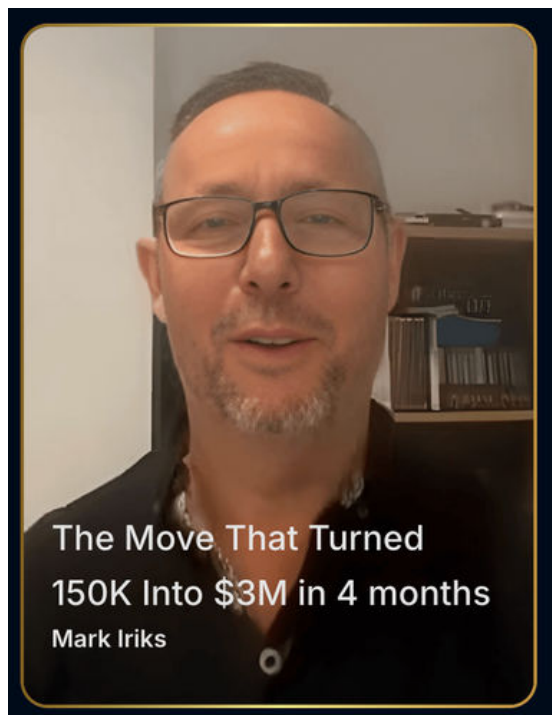
**Market Cap:**

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# Cutting Through the Noise: How to Choose Assets Wisely



## How Mark Turned \$150K Into \$3 Million in 4 Months With Zero Crypto Knowledge

Mark Iriks had no background in crypto. No tech skills. No trading experience. What he did have was \$150,000 Australian, a willingness to trust the process, and the CCI VIP Immersion team behind him. Within four months, his portfolio crossed \$3 million. "You don't need to have much technology or wisdom around you when it comes to crypto," Mark says. "Just need to have faith, understand it, and follow a process."

GR Grant Rawson  
AU - 1 review

Apr 28, 2021



It's not a course... it's a team

This is really is a very well put together course.

As someone from the pre-VHS era, it can be daunting exploring and researching this digital asset space. I found the structure and content of this course to be the perfect companion in that quest. I gained confidence in understanding the whole digital asset space, and it's behaviour and challenges.

There is a lot of white noise around Cryptocurrency, and again, this course was the perfect antidote to that. Learning how to block out, or ignore the noise and emotion, and just treat the whole thing based on evidence based **data** has been key to making significant investment gains.

6 weeks into the course I had paid for it a couple of times over, taking some profit out of the market, so it's easily been a good investment decision for me to do this.

Probably the greatest value in the course, however, is the almost instant access and response from the team (Joe, Sam and Tristan). Having access to their knowledge and expertise, and also learning from and with the community that exists within the CCI group has been invaluable.

The crypto space is full of noise. Thousands of projects. Conflicting opinions. Constant hype. For many investors, the biggest challenge isn't finding opportunities—it's knowing which ones are worth your money.

Our members learned to cut through the chaos using a systematic approach to asset selection. Instead of chasing every new coin or following Twitter influencers, they gained confidence in understanding the entire digital asset space, its behavior, and its challenges.

# PILLAR 4 – Investment Strategy

## Your Personalized Investment Plan

### Exercise 5.1: Investor Type

**Which type of investor are you?** (Choose one that resonates most)

- Day Trader** – Constantly buying/selling (High stress, losing to fees)
- Hope Investor** – Just hoping it goes up (No plan, high anxiety)
- Sideliner** – Too scared to invest (Missing opportunities)
- Value Investor** – Patient, educated, strategic ✓

**If you're not yet a Value Investor, what needs to change?**

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### Exercise 5.2: Time Horizon Strategy

**Define your investment timeframes:**

#### Swing Trading (Days to weeks):

• Allocation: \_\_\_\_\_ % of portfolio

• Strategy: \_\_\_\_\_

• Targets: \_\_\_\_\_

#### Cycle Trading (Months to years):

• Allocation: \_\_\_\_\_ % of portfolio

• Strategy: \_\_\_\_\_

• Targets: \_\_\_\_\_

### Decade Holding:

- Allocation: \_\_\_\_\_ % of portfolio
- Strategy: \_\_\_\_\_
- Targets: \_\_\_\_\_

### Exercise 5.3: Entry Strategy

#### How will you enter the market?

- Lump sum investment (amount: \$ \_\_\_\_\_ )
- Dollar-cost averaging (amount: \$ \_\_\_\_\_ every \_\_\_\_\_ )
- Wait for specific price levels
- Combination approach

#### My specific entry plan:

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### Exercise 5.4: Exit Strategy

#### Taking profits is essential. Plan yours now:

- At \_\_\_\_\_ % gain, I will take \_\_\_\_\_ % profits
- At \_\_\_\_\_ % gain, I will take \_\_\_\_\_ % profits
- At \_\_\_\_\_ % gain, I will take \_\_\_\_\_ % profits



## From Guesswork to Game Plan: Building a Winning Strategy



### How Brent Grinter 5X'd His Investment and Paid Off the Course 8 Times Over in Less Than 2 Months

Brent Grinter is not the type to overthink things. He joined CCI, followed the process step by step, and within two months had paid off the entire cost of the course eight times over. His portfolio hit 5X his initial investment. His message to anyone still on the fence? Stop thinking. Start doing. The roadmap is there. The support is there. The results speak for themselves.



Hanif Ibrahim

1 review  AU



May 24, 2025

#### Realistic, insightful and actionable

I've seen and experienced scores of courses over the years.

This one is the stand out.

Why?

Real world, balanced and actionable information with first class support.

The learning is transferable across investment disciplines which makes it intrinsically more valuable than crypto investing alone.

**The difference between winning and losing in crypto isn't luck—it's having a clear, actionable strategy.** Too many investors jump into the market without a plan, reacting to every price movement with emotion instead of following a proven roadmap.

**Our members discovered that success comes from following a step-by-step process.** No overthinking. No paralysis by analysis. Just a clear investment strategy, consistent execution, and the support to stay on track.

# PILLAR 5 – Mindset

## The Foundation of Success

### Exercise 6.1: Self-Programming Assessment

Examine your current beliefs, attitudes, and feelings about investing:



### Self-Programming

What do I believe about cryptocurrency?

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What do I believe about my ability to succeed as an investor?

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Limiting beliefs I need to change:

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Empowering beliefs I will adopt:

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When I think about investing in crypto, I feel:

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When the market is volatile, I feel:

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These feelings serve me:  Yes  No

## **Exercise 6.2: Standards & Discipline**

### **The standards I will maintain as an investor:**

- I will never invest more than I can afford to lose
- I will follow my strategy, not my emotions
- I will continue learning and improving
- I will keep detailed records of my investments
- I will review my performance objectively
- I will not compare myself to others
- I will take responsibility for my decisions
- I will maintain balance in my life

**My non-negotiable rules:**

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**Exercise 6.3: Education vs. Speculation**

**My commitment to education:**

I will dedicate\_\_\_\_\_ hours per week to learning about:

- Technical analysis
- Fundamental analysis
- Market psychology
- On-chain analytics
- Economic principles

**Resources I will use:**

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**Red flags that I'm speculating, not investing:**

- FOMO (Fear of Missing Out)
- Following random tips without research
- Investing in projects I don't understand
- Checking prices constantly
- Making impulsive decisions

**When I notice these, I will:**

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## Exercise 6.4: State Management

How will you maintain peak performance?

### Physical:

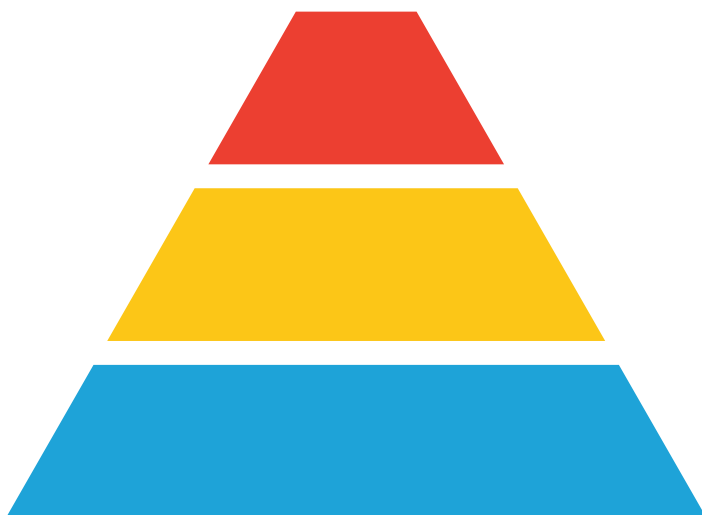
- Exercise routine: \_\_\_\_\_
- Sleep schedule: \_\_\_\_\_
- Nutrition: \_\_\_\_\_

### Mental:

- Stress management: \_\_\_\_\_
- Meditation/mindfulness: \_\_\_\_\_
- Breaks from screens: \_\_\_\_\_

### Emotional:

- Support system: \_\_\_\_\_
- Journaling practice: \_\_\_\_\_
- Celebration of wins: \_\_\_\_\_



**Movement**

**Focus**

**Language**

# The Mental Edge: Why Mindset Matters More Than Markets



## From Builder to Believer: How Jim Bantley Found His Pulse on the Crypto Market (Up 122%)

Jim Bantley spent years as a builder, driving neighborhoods to keep his pulse on the real estate market. When he found crypto through CCI's Mastermind program, he discovered a new kind of pulse. Now up 122%, Jim says the mindset shift was the biggest breakthrough of all. "This is a once in a lifetime opportunity. You gotta lean in and give it everything you got."

DS Dirk Sweeney  
AU · 4 reviews

Sep 28, 2025



CCI are categorically the best crypto...

CCI are categorically the best crypto advisory service available. There are graduate, VIP and Mastermind levels, of ascending commitment, so you can settle into a level appropriate for you. Addresses **mindset**, trading skills, risk management and much more. The core mentor group ( Joe, Sam and Paolo) are relatable, experienced, calm masters in this space. Joining will be the best decision of your life!

JN James Nixon  
AU · 4 reviews

Sep 28, 2025



Holistic supportive community of Crypto experts

If you're looking for holistic wrap-around education and support to learn crypto while also levelling up your life, **mindset**, and finances, the team at CCI are your people. They foster a supportive and engaging community of crypto experts, helpful community members, and professional affiliate services and businesses.

September 28, 2025 Unprompted review

Technical analysis and portfolio allocation matter—but they mean nothing if you can't control your emotions when the market moves against you. The biggest breakthrough our members experience isn't learning a new indicator or finding the next altcoin. It's the mindset shift.

Successful crypto investors develop mental discipline that separates them from the crowd. They learn to stay calm during crashes, avoid FOMO during pumps, and trust their strategy when everyone around them is panicking. This psychological edge is what transforms good investors into great ones.

# Your Personal Investment Plan

## Bringing It All Together

### Exercise 7.1: Your Complete Strategy

#### ASSET MANAGEMENT

- Wallet setup: \_\_\_\_\_
- Security measures: \_\_\_\_\_
- Backup system: \_\_\_\_\_

#### DATA-DRIVEN DECISIONS

- Primary indicators: \_\_\_\_\_
- Analysis frequency: \_\_\_\_\_
- Decision-making process: \_\_\_\_\_

#### ASSET SELECTION

- Risk profile: \_\_\_\_\_
- Core holdings: \_\_\_\_\_
- Position sizes: \_\_\_\_\_

#### INVESTMENT STRATEGY

- Entry method: \_\_\_\_\_
- Time horizons: \_\_\_\_\_
- Exit strategy: \_\_\_\_\_

## MINDSET

- Daily practices: \_\_\_\_\_
- Standards: \_\_\_\_\_
- Support systems: \_\_\_\_\_

### Exercise 7.2: 90-Day Action Plan

#### Month 1 Priorities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

#### Month 2 Priorities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

#### Month 3 Priorities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Exercise 7.3: Weekly Review Template

Copy this template and use it every week:

**Week of:** \_\_\_\_\_

### Portfolio Performance:

Starting value: \$ \_\_\_\_\_

Ending value: \$ \_\_\_\_\_

Change: \_\_\_\_\_ %

### Actions Taken:

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### What went well:

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### What needs improvement:

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### Next week's focus:

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Lessons learned:

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# Portfolio Tracker

## Monthly Portfolio Review

Month: \_\_\_\_\_ Year: \_\_\_\_\_

Asset	Amount	Entry Price	Current Price	Value	% Portfolio	Gain/Loss

Total Portfolio Value: \$ \_\_\_\_\_

Monthly Performance: \_\_\_\_\_ %

Year-to-Date Performance: \_\_\_\_\_ %

Reflections:

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# Trade Journal

## Document Every Investment Decision

**Date:** \_\_\_\_\_

**Action:**  Buy  Sell  Hold

**Asset:** \_\_\_\_\_

**Amount/Size:** \_\_\_\_\_

**Price:** \_\_\_\_\_

**Reasoning:**

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**Data that supported this decision:**

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**Emotional state:** \_\_\_\_\_

**Confidence level (1-10):** \_\_\_\_\_

**Result (complete later):** \_\_\_\_\_

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**What I learned:**

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# Mindset Reinforcement

## Daily Affirmations for Successful Investing

**Read these every morning:**

- I am a patient and disciplined investor
- I make decisions based on data, not emotions
- I have a clear strategy and I follow it
- I am continuously learning and improving
- I take responsibility for my investment decisions
- Volatility is opportunity for the prepared investor
- I am building long-term wealth systematically
- I trust my process and stay committed to my plan

## Weekly Reflection Questions

**Every Sunday, ask yourself:**

1. Did I follow my investment strategy this week?
2. What emotional challenges did I face?
3. What did I learn this week?
4. What will I do differently next week?
5. Am I proud of my discipline this week?

# Emergency Procedures

## When Things Don't Go As Planned

### If the market crashes significantly:

- Do NOT panic sell
- Review your original thesis
- Check if fundamentals have changed
- Consider if it's a buying opportunity
- Follow your predetermined plan
- Reach out to CCI community for support

### If you lose money on a trade:

- Review the trade objectively
- Identify what went wrong
- Determine if it was process or outcome
- Learn the lesson
- Adjust if needed
- Move forward without emotion

### If you're feeling overwhelmed:

- Step away from charts
- Review your long-term goals
- Talk to your accountability partner
- Reconnect with your 'why'
- Take a break and come back refreshed
- Remember: this is a marathon, not a sprint

# Your Commitment Contract

## Making It Official

I, \_\_\_\_\_, **commit to becoming a sophisticated cryptocurrency investor.**

### I understand that:

- Success requires education, discipline, and patience
- I am responsible for my own investment decisions
- Cryptocurrency investing involves significant risk
- I will not invest more than I can afford to lose
- I will follow the 5 Pillar Strategy
- I will ask for help when needed

### My specific commitments:

1. I will dedicate \_\_\_\_\_ hours per week to learning
2. I will follow my written strategy
3. I will keep detailed records
4. I will maintain my security practices
5. I will manage my emotions and mindset

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Accountability Partner:** \_\_\_\_\_

**Review Date (90 days):** \_\_\_\_\_

# Conclusion: Your Journey Begins Now

Congratulations on completing this workbook! You now have the framework to become a sophisticated cryptocurrency investor.

## Remember:

- **Value Investors** are patient, educated, and strategic
- The 5 Pillars work together as a complete system
- Consistency matters more than perfection
- Community support accelerates your success
- Your mindset determines your outcome

## Next Steps:

1. Review this workbook regularly
2. Implement one pillar at a time
3. Join the CCI community
4. Book your strategy call
5. Start your 90-day action plan
6. Commit to continuous improvement

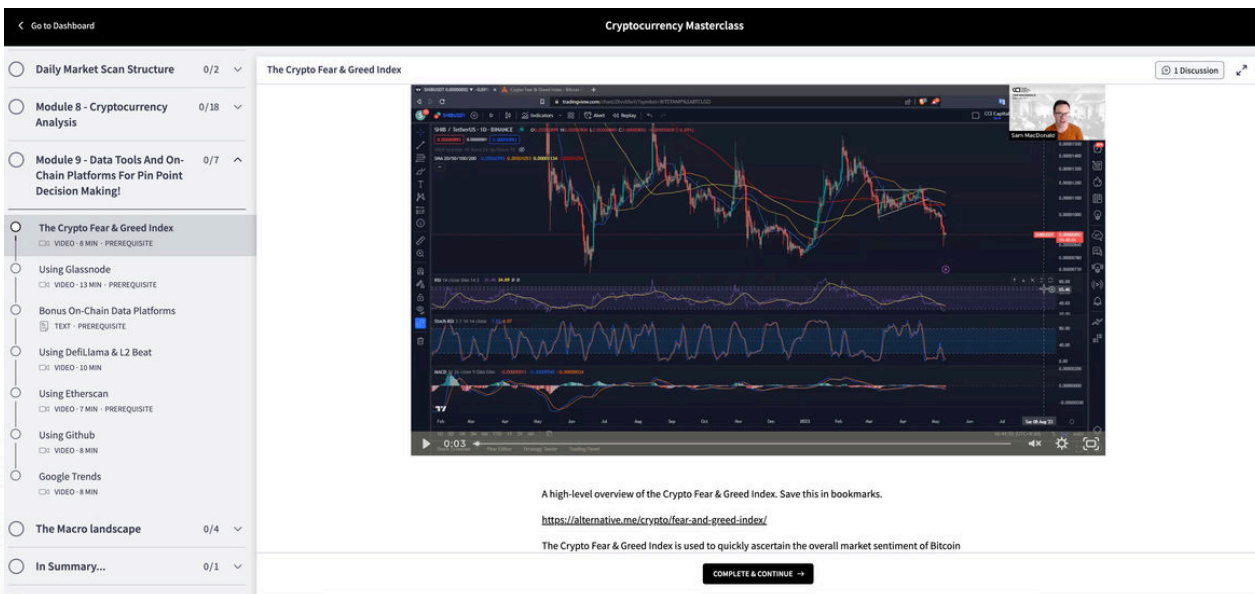
**You are only one investment away from changing your financial future.**

But more importantly, you're building something sustainable—a systematic approach to wealth creation that will serve you for decades.

***"The best time to start was yesterday. The second best time is now."***

# CCI VIP Immersion Program

- Life-time access to **World Class Training**
- Access to an **Intensive VIP Support Network**
- **Lifetime Graduates Community Access**
- **The Best Tools and Platforms** Used by Million-Dollar Investors.
- **Weekly Coaching** of Buy and Sell Levels and Investment opportunities
- **One on One Graduation Call**
- **Assignments, Quizzes and Success Checklist**
- **Official CCI Certificate**
- Partnered up with **Leading Cryptocurrency Businesses**
- Be part of the **Safe and Sophisticated Community**
- Be Our Next **Client Success Story!**



The screenshot shows a video player interface for a course titled "Cryptocurrency Masterclass". The video is titled "The Crypto Fear & Greed Index". The main content is a candlestick chart with several technical indicators overlaid, including moving averages and a volume indicator. The video player has a progress bar at the bottom showing 0:03. Below the video, there is a description: "A high-level overview of the Crypto Fear & Greed Index. Save this in bookmarks. <https://alternative.me/crypto/fear-and-greed-index/> The Crypto Fear & Greed Index is used to quickly ascertain the overall market sentiment of Bitcoin". There is a "COMPLETE & CONTINUE" button at the bottom right of the video player. On the left side, there is a navigation menu with various course modules and their completion status.

Learn the 5 Steps Process Minimise Risk & Maximise Returns in Cryptocurrency

THE NO.1 RATED CRYPTO EDUCATION PROVIDER ON TRUSTPILOT

# Crypto Investment Education That Actually Works

Create a 6-Figure+ Crypto Portfolio in 12 Months With CCI's Proven 5 Pillar Program

Book Your Strategy Call

Only 15 Free Strategy Session per week - 12 spots left!

Excellent 200+ reviews on Trustpilot



71+

Combined Crypto Experience

\$56,000,000

Recorded Client Profits

3K+

Clients worldwide



## Book Your Free Strategy Call

Get a personalised crypto plan based on your goals, risk profile, and current portfolio.

## What You Will Learn?



### SAFETY

Protecting your capital from scams and hacks



### CLARITY

Cutting through the noise and confusion



### CONFIDENCE

Knowing exactly when to buy, hold, or sell



### DIRECTION

Having a proven roadmap to follow

## You've completed this workbook. You understand the 5 Pillars. Now it's time to take action.

The difference between those who succeed in crypto and those who don't isn't knowledge—it's implementation. You need a personalized roadmap that fits your unique situation, goals, and risk tolerance.

### That's what the Strategy Call is for.

#### What You'll Get on Your Free Strategy Call:

- **Personalized Portfolio Review** - We'll analyze your current situation and identify gaps in your strategy, security, and asset allocation
- **Custom Action Plan** - A clear roadmap tailored to your specific goals, timeline, and investment capacity so you know exactly what to do next
- **Risk Assessment** - Understand your personal risk profile and discover the optimal allocation strategy that matches your comfort level and objectives
- **Market Timing Insights** - Where we are in the current market cycle and what that means for your investment decisions right now
- **Program Overview** - Learn if the CCI VIP Immersion Program is right for you, with no pressure and complete transparency about what's involved

**Normally \$250 — FREE when you book today after attending this event.**



**This is a limited-time offer exclusively for event attendees. Once you leave today without booking, this opportunity expires.**

## **Book Your Free Strategy Call**

## **Crypto Consulting Institute**

[www.cryptoconsultinginstitute.com](http://www.cryptoconsultinginstitute.com)

This workbook is a companion to Joe Shew's presentation and the CCI VIP Immersion Program. For maximum benefit, use this in conjunction with the full course materials and community support.

**Document Version:** 1.0

**Last Updated:** February 2026

**For:** Event Attendees – February 19, 2026

**What problem does it solve?**

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**Why is this better than competitors?**

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**Team credibility:**

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**Tokenomics (supply, distribution):**

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**Risk factors:**

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**My conviction (1-10):**

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**Position size:**

----- % of portfolio

### What will I do with profits?

- Reinvest in stable assets
- Take money off the table completely
- Rebalance into Bitcoin
- Other: \_\_\_\_\_

### Stop-loss strategy:

If my investment drops \_\_\_\_\_%, I will:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Exercise 5.5: Weekly Investment Routine

Create your weekly schedule for crypto investing:

### Monday:

- Review market analysis (\_\_\_\_\_ minutes)
- Check portfolio performance
- Read news/updates

### Wednesday:

- Review on-chain data
- Adjust orders if needed
- Study/education time

### Friday:

- Weekly review
- Plan next week's moves
- Journal reflections

**Time commitment:** \_\_\_\_\_ hours per week total

# SECTION 10: Resources & Next Steps

## Continuing Your Education

### Recommended Learning Path:

#### Week 1–4: Foundations

- Complete CCI VIP Immersion Program intro modules
- Set up secure wallets
- Make first small investment
- Join VIP community

#### Week 5–8: Technical Skills

- Learn basic chart reading
- Understand market cycles
- Practice with portfolio tracker
- Attend weekly training sessions

#### Week 9–12: Advanced Strategies

- Develop personal trading system
- Refine entry/exit strategies
- Review and adjust portfolio
- Schedule graduation call

#### Ongoing:

- Weekly market analysis review
- Monthly portfolio rebalancing
- Quarterly strategy assessment
- Continuous learning

# Success Metrics

## Measuring Your Progress

Beyond portfolio value, track these metrics:

### Knowledge Metrics:

- Courses completed: \_\_\_\_\_
- Books read: \_\_\_\_\_
- Hours of education: \_\_\_\_\_

### Behavioral Metrics:

- Days following strategy: \_\_\_\_\_ / \_\_\_\_\_
- Emotional trades avoided: \_\_\_\_\_
- Strategy reviews completed: \_\_\_\_\_

### Community Metrics:

- VIP sessions attended:
- Questions asked:
- Help given to others:

### Personal Metrics:

- Stress level (1-10):
- Confidence level (1-10):
- Life balance maintained:  Yes  No