

"A must-read for anyone serious about developing their self-defense skills."

— **Natan Levy**, UFC veteran

COVERT SELF-DEFENSE

**THE UNEXPECTED ADVANTAGE
OF FIGHTING WITH A PEN**



J-F TRUCHON

FOREWORD BY DOUG MARCAIDA

PRAISE FOR COVERT SELF-DEFENSE

“A must-read for self-defense instructors and anyone developing real self-defense skills. Covert Self-Defense is truly mind blowing. It is a practical and eye-opening resource that shows just how much there is to understand about violence outside the cage.”

—**Natan Levy**, UFC veteran, decorated grappler, Karate & Kung Fu black belt, Brazilian Jiu-Jitsu purple belt, USDC Champion, self-defense & MMA instructor

“A clear, practical guide to staying safe in unpredictable times. J-F Truchon’s research and illustrations make every lesson vivid, real, and easy to absorb. Highly recommended.”

—**Rokas Leonavicius**, creator of the *Ultimate Self-Defense Championship*, black belt in Aikido, dedicated to exploring realistic and effective self-defense training.

“Covert Self-Defense might sound like a niche manual, but J-F Truchon takes a 10,000-foot view of self-protection itself. Even if you never intend to fight with a pen, this book is packed with practical, field-relevant insights that truly shine. Highly recommended.”

—**Craig Douglas**, founder of ShivWorks, retired SWAT and undercover narcotics officer, Brazilian Jiu-Jitsu black belt, and internationally recognized expert in close-quarters self-defense.

“If confidence, not conflict, is your goal, Covert Self-Defense deserves your attention. It combines practical awareness with lawful, decisive action and simple, scalable tactics designed to keep you out of trouble and get you home safe. You don’t want to skip this.”

—**Michael Donvito**, 5th-degree Brazilian Jiu-Jitsu black belt and founder of EliteYou, a close-combat instructor with over two decades of experience training military and law-enforcement units.

“J-F Truchon delivers an exceptional guide that draws on the experience of true experts and applies it to the realities of personal protection. He captures what matters most under pressure, rapid decision-making, controlled execution, and the will to prevail when it counts. Covert Self-Defense stands out for its practical and responsibly taught techniques, especially its innovative use of a pen as a defensive tool. More than a book about tactics, it’s a well-researched, collaborative work on preparedness, awareness, and survival. A must-read.”

—**Randy Turner**, former Joint Task Force 2 Special Operations Assaulter, former professional MMA fighter ranked top 10 in Canada, Brazilian Jiu-Jitsu black belt, and founder of Direct Actions Combat Performance.

COVERT SELF-DEFENSE

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THE UNEXPECTED ADVANTAGE
OF FIGHTING WITH A PEN

ATOMIC BEAR PRESS
MONTRÉAL



BY JEAN-FRANÇOIS TRUCHON

PUBLISHED BY ATOMIC BEAR / INNORAVE INTERNATIONAL INC.
MONTRÉAL, CANADA

COVERT SELF-DEFENSE

The Unexpected Advantage of Fighting with a Pen

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Cover design by Lorrinda Khan - Interior design by Max Kolpak - Technical illustrations by Tom Mandrake (Part III) - Supplementary illustrations by Damian Augustyniak (Part I, II, and IV) - Indexation by Hesham Gneady

HARDCOVER ISBN: 978-1-0698884-1-9

E-BOOK ISBN: 978-1-0698884-3-3

AUDIOBOOK ISBN: 978-1-0698884-2-6

1st Edition, December 2025

To Kirsty,
*my wife—my rock, my spark, and my daily reminder
that strength and kindness can coexist.*

*Your unconditional support, your words of wisdom, and
your love make me a better person every day.*

“It is better to be a warrior in a garden than a gardener in a war.”

—Chinese proverb

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FOREWORD BY DOUG MARCAIDA

When you strip away all the techniques, all the training, all the gear, what's left is intent. Why do you train? Why do you carry? Why do you fight?

I've always believed the answer should be simple: for pleasure and to protect life. To protect the people you love, and maybe even the person who's trying to harm you. Because sometimes, the right decision, the right movement, the right mindset can stop a tragedy before it ever begins.

That's why I was drawn to The Atomic Bear and to the work of Jean-François Truchon—or Jeff, as many know him.

When I first met Jeff, we instantly connected on that idea. He wasn't just trying to make another self-defense tool. He was building something with purpose and something that gave regular people around the world a chance to be prepared, confident, and calm.

When he showed me this defense pen, I thought, "*This is different.*" It's simple, discreet, and non-threatening—but in trained hands, it could change the outcome of a dangerous moment. We ended up working together, teaching a live seminar and creating a program called *The Way of The Pen*.

In this book, *Covert Self-Defense: The Unexpected Advantage of Fighting with a Pen*, Jeff teaches how to stay alert, how to make decisions under pressure, and how to use an everyday object to level the playing field when life throws danger your way.

I am honored to contribute to the technical section, showing some of the principles and techniques you can apply with a defense pen. Those principles are drawn from decades of martial arts training and real-world understanding.

But here's what I want you to remember: this is not about learning how to fight. It's about learning how to *not* fight, unless you absolutely must.

It's about options. Choices. Awareness. Knowing when to walk away and when to act. Because once you move, once you engage, you carry responsibility: legal, moral, human responsibility. You must know what you're doing, why you're doing it, and when to stop.

That's the art behind *Covert Self-Defense*. It's not flashy. It's not about being the toughest person in the room. It's about being the calmest. The most aware. The one who sees danger coming and handles it with precision and restraint.

The pen is a perfect symbol of that. It's not intimidating. It doesn't scream aggression. It's just... there. In your pocket. A tool for writing, creating, signing a contract, jotting a note, or, when life demands it, defending yourself. It's a reminder that the power to protect isn't about what's in your hand—it's about what's in your heart and how you choose to act.

Covert Self-Defense makes this possible.

The illustrations by Tom Mandrake translate words into movement. You can almost feel the flow of each move, the intent behind every angle and strike. It brings the lessons to life and guides your imagination to understand the techniques and movement that words alone can't capture.

The combination of perspectives and talents makes this book a unique treatise on the philosophy behind carrying a pen for self-defense.

I've trained with all kinds of weapons and tools, but what I've learned over time is this: the most powerful weapon you'll ever carry is with you when you need it.

With the ability to fight comes the duty of avoiding the fight. Take the time to digest each chapter about situational awareness, the legal aspects of self-defense, and de-escalation.

Awareness gives you time. Time gives you options. And options give you life. This book teaches you how to think clearly, move smartly, and act decisively when everything is on the line.

I really encourage you to read *Covert Self-Defense* from cover to cover. Don't rush through it. Let each lesson challenge how you see awareness, protection, and responsibility.

So, as you read these pages, keep this in mind:

The hand learns technique.

The mind learns awareness.

The heart learns restraint.

And in that balance, we find true strength.

You don't have to be a fighter to learn this. You just have to care about yourself, your family, and your right to walk through the world without fear.

That's what *Covert Self-Defense* is about.

It's not about turning people into evil. It's about helping good people stay safe ethically, intelligently, and effectively.

Because at the end of the day, it's not about the pen. It's about you, your mindset, your awareness, and your will to live.

Stay safe. Stay aware.

Doug Marcaida,

Filipino-American edged-weapons expert, founder of Marcaida Kali, and judge on History Channel's *Forged in Fire*.

INTRODUCTION

“A man who does not think and plan long ahead will find trouble right at his door.”¹

—Confucius

Nicolae Miu adjusted his sunglasses as the July sun shimmered on Wisconsin’s Apple River. It was supposed to be a carefree tubing trip with friends and his wife, an easy glide down the current under the wide summer sky. But somewhere along the way, he had drifted off, searching for a phone that had gone missing in the water. The river was more crowded than he expected—rafts and tubes bumping together, laughter ringing out, bodies splashing everywhere.

He struggled toward the bank, scanning faces, peering through the haze of sun and noise. That was when he spotted a group of young people, late teens and early twenties, clustered near the water. Maybe they had seen something or could help.

“Hey,” he called out, lifting a hand. “Have you seen a phone? I lost one in the river.”

But the moment his voice carried across the water, the mood shifted. Their smiles faded, eyes narrowed. One of them stepped forward, squaring up with a look that prickled the back of his neck.

“What are you doing here?” the young man snapped.

“I’m just looking for my phone,” Miu answered, trying to sound calm.

A chorus rose around him, sharp and fast. “Get away. What are you doing here?” The words stung.

“He’s looking for a girl!” one of the teenagers accused him.

“Creep,” another shouted.

He blinked, stunned—where had that come from? The accusation triggered anger. “No, you don’t understand.”

Miu kept walking and looking for his lost phone in that spot. But the circle closed tighter. The laughter that had once floated on the river was gone, replaced by voices that cut like knives. A shove came hard against his chest, and he stumbled back into the shallows. Another blow landed. His breath hitched. The crowd pressed in, a blur of faces and splashing water, and his pulse hammered in his ears.

“Stay back!” he shouted as he was getting back up, but the words dissolved into the roar around him.

Fear clenched his chest. Instinct took over. His hand went to the pocketknife he had carried for years. The blade snapped open with a metallic click that seemed to silence the world for a heartbeat. He held it out, arm shaking.

But then the surge came. Bodies pressed in. In the blur of panic, his arm slashed, a reflex more than a choice. A figure fell. Then another. The water darkened, streaked with red. Screams pierced the air. The group scattered, some wailing, others frozen.

He staggered upright, chest heaving, the knife heavy in his grip. The river—once alive with carefree shouts—now echoed with chaos. He looked down and saw blood rippling across the current like ink spilling on paper. His stomach turned.

How did it come to this? A simple search for his phone, a moment of misunderstanding, and now—this. A boy lay motionless. Others clutched wounds. The shouts of horror carried downstream, each one tightening around his chest like a noose.

He looked at them—blood, screams, someone inching toward him—and something inside him snapped. But then, just as suddenly, he froze. No words came. Only the weight of what he had done pressed down. He covered his face, whispering, “Oh my god...” His hands shook, and every echo of the river around him felt distant. Seconds later, someone asked if anyone had called 911. Miu’s voice was barely there: “What happened? Tell me... what happened?” His mind spun—relief that the knife had been there, fear that it might have been taken from him instead. Holding the knife, he walked away.

Because Miu knew he was innocent and acted in self-defense, he sat with the police officers that day to give his detailed deposition.

Later, in a courtroom miles from the river, a jury would call it reckless. They would not see self-defense; they would only see blood in the water. On July 31, 2024, the judge’s gavel fell: twenty years in prison, followed by six years of supervision.² A summer day had become a life sentence.

This story is shocking because it could be anyone’s. Miu was not a criminal. He was a hardworking father having a good summer day, and was definitely unprepared to face what life was about to throw at him. Many lives changed forever on that day, including his family’s and those of the grieving families who lost a child or cared for the gravely injured. He suddenly became a criminal.

We cannot predict the future, but some of us who read this book may, unfortunately, encounter similar events. I wrote this book first and foremost out of a selfish desire to be better prepared. Second, I believe that my work and findings have the potential to help thousands more to be prepared, avoid killing or being killed, and avoid being perceived as a criminal by a justice system not built for innocent people forced to use violence.

Why should you listen to me? This book is the conclusion of countless hours of research, learning, and interviews. One of my talents in life is asking questions and finding deeper, more insightful answers. I learned that from years spent in research as a PhD scientist. I bring the same attitude here. I competed at a national level in fencing in my 20s. I regularly practiced Brazilian Jiu-Jitsu. I frequently attend combative and self-defense workshops.

This book, though, is not about who I am, but who I want to become. I would like to bring you along on my journey of learning from the best instructors, from philosophy to law, martial arts, and psychology, through to innovative ways of fighting with a pen. I have personally met with and interviewed numerous experts. I flew across the United States and the world to attend workshops and seminars. I partnered with a reality TV show to experiment with what a pen can do in realistic self-defense scenarios.

In my opinion, the art of fighting with a pen, strangely enough, is in its infancy. No other weapon is as unassuming, as easy to carry, and possibly as effective. In my research, I discovered new ways to fight with a pen. This book marks the beginning of something totally unexpected with endless opportunities, offering advice from creative experts like Doug Marcaida or former UFC fighters like Natan Levy.

When you give a pen to a fighter and challenge him or her to use it, you find new ways and sometimes *better* ways. I will do my very best to cite the sources of the techniques and even the muse of an idea I have developed.

For transparency's sake, I will be mentioning tactical pens designed and being sold by my company: The Atomic Bear. Let me briefly explain. If you have watched movies like *The Bourne Identity*³, *John Wick: Chapter 2*⁴, or *The Accountant 2*⁵, you have seen the masterfully well-choreographed fighting scenes with a pen or a pencil. These scenes are great, but when you take a regular pen in your hand and hit something with it with decent power, you quickly realize that this inflicts as much harm to your hand, and often the pen breaks.

This is why I started creating my own pens. I refer to them throughout this book because they are part of my own everyday carry, and they've

also become popular among professional trainers. But any pen you feel comfortable holding and striking with is what you need!

I firmly believe that the use of the pen is a uniquely powerful solution to self-protection. By embracing the philosophy of fighting with a pen, we reduce our legal exposure, widen the locations where we can protect ourselves, and can record our thoughts and ideas, as well as criminal license plate numbers. Carrying a pen has no legal restriction anywhere in the world.

A question I am asked all the time: “Can a pen actually be useful in self-defense?” In this book, I will explain which pens are better weapons. I will share with you various techniques that lead to different levels of outcomes. I will share how to use century-old and thoroughly tested Olympic fencing techniques with your pen.

I will clearly explain the principles behind the law of self-defense in a way that can be used and adapted to your local jurisdiction. I will teach you how to be invisible to criminals and how to spot them, and how to remain aware of your environment, control your mind, and calm your anger. We will distinguish between effective and ineffective methods of dealing with the use of force.

I will give you specific *verbal judo* techniques to de-escalate potentially explosive situations. I will share best practices in the aftermath of using force. After reading this book, you will be transformed and have acquired mental and physical skills far beyond those of the average person.

We will revisit the Nicolae Miu story, and you will see it from a totally different perspective with a much bigger toolkit to analyze it. You will not be the same person. I know because writing this book taught me thousands of lessons. I came out a changed person, and it can change you too.

Each chapter stands on its own, but the book follows a deliberate progression and is best read in sequence. Chapters 1–4 explore the mindset of self-defense. Chapters 5–9 develop mental skills and knowledge. Chapters 10–15 demonstrate the physical techniques for using a pen in self-defense. Chapter 16

addresses post-incident actions, Chapter 17 applies the book's principles to a real-world case, and Chapter 18 brings it all together in conclusion.

I have assembled a large collection of free resources, including videos and several hard-to-find articles, at covertselfdefense.com/blackbook. I strongly recommend you check them out.

Thank you for choosing to arm yourself with knowledge, skill, and a pen rather than fear. By reading this book, you are joining a movement of responsible defenders who value preparedness over panic and ethics over escalation.

As Louis Pasteur wrote, "Chance favors the prepared mind."⁶ Let's build our luck up!



PART I

THE MIND OF COVERT SELF-DEFENSE

Understanding Self-Defense and Why a Pen Is an Unexpected Advantage

Before we learn to defend, we must learn to see. Part I uncovers the unseen realities behind violence—the moral, legal, and psychological dilemmas that shape every self-defense decision. You will understand why most people fail; not because they lack courage, but because they misunderstand the problem itself. By exploring how the law, culture, and emotion intersect in moments of danger, you will begin to build a foundation rooted in awareness and reason, not fear. This is the awakening every covert defender must experience before carrying any weapon—even a pen. We will also learn about what makes the pen a unique improvised weapon.

CHAPTER 1

THE FIVE HIDDEN DILEMMAS OF SELF-DEFENSE

“We are our choices.”¹

—Jean-Paul Sartre

Laura’s breath made little clouds in the cold night air as she walked fast down the empty streets. The clock had just struck midnight, the end of her long shift at the hospital. The sound of her steps on the cobblestones was a comforting rhythm in the quiet night.

But tonight felt different. She felt a weird tingle on her neck. Looking back, she saw someone in a hooded jacket in the distance. At first, she thought it was just by chance, but when she walked faster, so did he.

As she felt her chest tightening and her breath shortening, she slipped her hand into her purse, trying to grab the pepper spray lost in the clutter. She tried to think calmly—maybe he was just someone else out late.

She crossed the street to get away from him. He crossed, too, keeping up with her, getting closer. Laura’s heart was beating loudly in her ears. She thought about yelling for help, but she was scared of looking silly if she was wrong.

As the person got closer, Laura did not know what to do. Should she confront him? Spray him right away? But what if he was just a normal person walking by? She did not want to make things worse just because she was scared.

Her mind focused on the threat behind her; she turned a corner and realized it was a dead-end. The person in the hood kept coming, his steps now easy to hear. Laura held onto her pepper spray tighter. She heard a voice, but her brain was not processing the words. She did not know what to do, torn between protecting herself and not wanting to overreact.

When he got close, she made up her mind. She turned around, pepper spray ready, and—quivering with fear—shouted, “Stay back!” He stopped fast, and his hood fell back, revealing a young guy, about twenty years old. His eyes were as wide and scared as hers.

“I... I’m sorry,” he said quickly, his hands up, showing he meant no harm. “I didn’t mean to scare you. I thought you were someone I knew. I didn’t realize... I’m sorry.”

Laura still felt her heart racing, but he did not seem like a threat anymore. They stood there for a second, both caught in a mix-up that seemed worse because it was late and they were alone.

The guy said sorry again and walked away fast. Laura was left there with her heart pounding. She put down the pepper spray, her hands shaking. As the panic transformed into relief, she put the pepper spray into her pocket and went home safely.

This story makes you wonder what might have happened if the situation were different. The pepper spray was good to have, right? Should Laura have used it right away? It depends on what the guy really wanted, which she did not know until she asked. Waiting to ask might have been dangerous if things had gone the other way...

Laura’s story shows us the many tough choices and uncertainties when it comes to defending ourselves. When in danger, it is hard to know what the person threatening us is really thinking. How far will they go? What

do they really want? Are they thinking clearly, or are they acting wildly and unpredictably?

These tricky parts are key to understanding how to protect ourselves. There are five significant dilemmas or tough problems that are worth considering. These dilemmas are what make it hard to decide what to do when we are in a terrifying situation and do not have all the information we need.

THE PRACTICAL DILEMMA

When threatened, we have to quickly figure out how dangerous a situation is and decide how to respond. Sometimes, we might be wrong about the intentions of the person threatening us. Is the danger right now? Is the person getting more violent?

Are they trying to scare us, hurt us, or something even worse? Figuring this out right when it is happening is a challenge, especially if the person is acting weird or is under the influence of drugs or alcohol.

When we are just reacting to what is happening, we are a step behind the person causing the threat. The time it takes to understand what is happening, decide what to do, and then respond can mean the difference between getting away safely and ending up in a dangerous situation.

There are also other elements that make this problem even more complex. Bad lighting, being in an unfamiliar place, or being in a crowded area can make it harder to figure out the level of danger. Also, how we are feeling—tired, stressed, or scared—can affect how we make decisions. We might over- or underreact.

Are we traveling abroad, surrounded by people of different cultures, languages, habits, and dangers we do not even know or understand?

In the end, dealing with the challenge of self-defense means being aware of what's happening around us, knowing what we can and cannot do, understanding the laws, and being ready to handle the judgment of others.

This kind of approach can help us make better choices when we are facing possible danger, and it can increase our chances of remaining safe.

It sounds all logical in a book... but in reality, until we gain experience, it is a nightmare. Over the coming pages, I will share many stories to help us learn how to make better decisions. Keep reading!

THE MORAL DILEMMA

This dilemma considers the tough choices we have to make when we might hurt someone else to protect ourselves. This becomes even harder to think about when the danger is not as bad as we initially thought. If we hurt someone badly or even cause their death while defending ourselves, it can leave us in a bad mental state for a long time. These tough feelings about what we did can stick with us even after the danger is gone.

I remember watching a security video about three years ago of a store being robbed. In the video, a criminal points a gun at the cashier. While the cashier gives him the money, a customer in the store suddenly shoots the robber in the head, and he falls dead. Later, they find out the robber's gun was not real, and he was not going to hurt anyone. Whether the customer's actions were legal or not depends on various factors and the laws where the incident occurred. But the big thing is, the robber is not coming home. This makes us wonder: how does the customer feel about what they did, given that they were trying to help?

This moral problem is not just about one person defending themselves. It brings up bigger questions about when it is okay to use violence, how we value human life, and how society understands self-defense. How do people feel about using deadly force to protect themselves, especially if the threat was not that serious as analyzed after the event? What happens to someone's mind if they have to take a life to defend themselves, and how does everyone else help them afterward? Someone who has hurt or killed someone else in self-defense can feel many tough emotions like guilt, sadness, and worry. They might continue to think about what they did and if they really had to use so much force. Dealing with the moral side of self-defense means

finding the right balance between protecting oneself and understanding the significant impact of harming someone else. It is about really understanding how these actions affect us and everyone else.

THE LEGAL DILEMMA

The rules about self-defense can change a lot depending on where you are. Sometimes, what police and courts think is acceptable in one place might be seen as excessive in another. This makes it hard for people to know the right way to act if they need to defend themselves.

If you travel, you might find that the self-defense rules are different from what you are used to at home. What is considered okay in one country could get you in big trouble in another. The same goes from state to state.

The “stand your ground” principle, for instance, can vary greatly between states. Can you defend yourself without trying to run away first? In Florida, there is no duty to retreat even when using deadly force if one reasonably believes it is necessary to prevent death, great bodily harm, or the commission of a forcible felony.² In Massachusetts, there is a duty to retreat everywhere outside your home if retreat can be done in complete safety.³ These different rules can be confusing, especially when life or death decisions are made in a split second.

The law on the use of weapons for self-defense varies widely, too. In some places, you cannot carry certain weapons like pepper spray, tasers, knives, or guns. But in other places, it is okay to have these weapons. You need to know these rules, so you do not break the law by accident when you are trying to protect yourself. Sometimes, even law scholars disagree on how to apply them! How, then, can a regular citizen navigate this... and then respond in a court of law—judged by people who were not there?

After a self-defense situation where you used a weapon, there might be a variety of legal proceedings to deal with. Even if you were defending yourself and did everything right, you might still have to go through an investigation

and maybe even go to court. This can be time-consuming, stressful, and costly. What you do can affect not just you, but also your family and friends.

Self-defense laws can also change over time. New laws get put in place, and what people think is okay can shift. If you are worried about self-defense, stay informed on these changes. Not knowing the law is not a defensible excuse, and getting the rules wrong can lead to big trouble.

Dealing with the legal side of self-defense means understanding the laws where you live, knowing the implications of using force or weapons, and being prepared for what happens legally after a self-defense situation. This knowledge is extremely important for anyone who wants to protect themselves while also avoiding legal trouble.

In the next chapter, we will dive into the legal aspect of self-defense with Attorney Andrew F. Branca.

THE SKILLS DILEMMA

This dilemma shows the difference between how good people think they are at protecting themselves and how good they need to be when they face real danger. This problem appears in two major ways: people who do not have enough training might not be ready, and those with extensive training might be too confident.

For people who have not practiced any martial arts or engaged in self-defense training, facing a threat can be scary. They might not realize how mentally and physically tough it can be. Without training, they do not know the basic moves that could help them stay safe. They might freeze when faced with a physical threat. Even worse, they may be willing to engage in a fight without fully realizing the intensity of it.

On the other side, people who have trained a lot in martial arts or self-defense might think they can handle more than they actually can. This is reminiscent of the so-called Dunning-Kruger effect.⁴ This is a cognitive bias where people with low skill or knowledge in a domain overestimate

their own competence, while those with high skill or knowledge tend to underestimate their ability relative to others. For example, someone who is good at martial arts in a gym might not be ready for a crazy, unexpected situation like a real attack. They might think they can control things more than they can, which could make the situation more dangerous.

Being good at martial arts or knowing how to use weapons in a safe place does not mean you are ready for a real fight. Real fights have elements you did not train for, like multiple attackers, weapons, small spaces, or having to protect other people. Also, being really scared or stressed can make it hard to apply what you have learned.

Perhaps the most surprising takeaway from my quest is that acquiring fighting skills is not the most important part of self-defense. The so-called *soft skills* that we will cover in this book are probably the most important skills to acquire. Building up your mental strength is the least *sexy* skill, but the one with the best outcome. Do not worry, I have plenty of tools for you ahead.

Ultimately, the skills issue in self-defense is about acquiring a combination of skills. You need to know what you can do and the difference between practicing and real-life danger. Good self-defense training should teach you a range of skills, like how to tell if there is danger, calm things down, remain aware of your surroundings, and the best ways to handle the mental part of being in a scary situation, as well as how to defend yourself physically. Understanding and working on these issues is crucial to ensuring you are truly prepared to protect yourself in different kinds of situations.

As you read more of this book, you will find new skills and tools. Keep in mind that we are never ready enough for a physical altercation. Sharpening your non-fighting skills is even more important. Always remember that we overestimate our capacity even when we think that we do not.

THE NORM OR CULTURAL DILEMMA

Self-defense is also about how society's expectations can influence the way we react when we feel threatened. Often, these social rules tell us not to

start fights or be aggressive, which can make it hard for people to trust their gut feelings in dangerous situations and could even put them in danger.

In the previous story, Laura was scared to seem aggressive and reluctant to embarrass herself. Society often tells us to remain calm and not to start fights, especially in places like stores or parks. Worrying about appearing too aggressive can prevent someone from taking decisive action to protect themselves when they really need to.

This problem is made even more complex by the way many of us are brought up to think about fighting and being aggressive. Many people learn from a young age that fighting is wrong, which makes them reluctant to act that way. The tension between learned habits and the need for a quick and violent reaction makes good people more vulnerable.

We cannot forget about how different expectations for men and women play a role here, too. Women are often expected to be gentle and not start fights. This can make them doubt themselves and hesitate in situations where they need to be strong and quick to protect themselves. Overcoming these expectations can be a significant challenge for many women, and it is not just about being physically ready but also mentally prepared.

Movies, TV shows, and social media also shape how we think about violence and self-defense. They often portray these things in a way that is not realistic, which can make people think they should act a certain way in dangerous situations, even though it might not be the best idea.

Finally, understanding these dilemmas is necessary for anyone who wants to learn about self-defense. This book is here to help you better understand these issues and provide you with ideas and tips on how to deal with them. We are going to discuss how to spot danger, understand the legal aspects, learn effective self-defense moves, and handle the tricky parts of self-defense. The goal is to ensure you are ready in every way—physically, mentally, and in knowing what is right—to protect yourself when you need to.

SUMMARY

This chapter explores the psychological, moral, and legal complexities behind real-world self-defense. True self-defense is not only about physical readiness—it is about understanding five hidden dilemmas that shape how we act under threat: practical, moral, legal, skill-based, and cultural. By recognizing these challenges, readers can make smarter, faster, and more ethical decisions when it matters most.

KEY TAKEAWAYS

- **Practical Dilemma:** Real threats are chaotic—assessing danger quickly under stress is harder than it seems.
- **Moral Dilemma:** Even justified self-defense can leave lasting guilt, grief, or doubt after harming another person.
- **Legal Dilemma:** Laws vary widely; what is legal in one place could mean prosecution in another.
- **Skills Dilemma:** Training mismatches reality—untrained people freeze, while overconfident ones underestimate danger.
- **Cultural Dilemma:** Social pressure to appear calm or “nonviolent” can suppress instinct and delay necessary action.

CHAPTER 2

THE FIVE LEGAL PILLARS OF SELF-DEFENSE

“If you are not capable of cruelty, you are absolutely a victim to anyone who is.”¹

—Jordan Peterson

In the isolated, fog-shrouded waters of Alaska’s Bering Sea in June 1991, 32-year-old Xi Van Ha, a fisherman new to the grueling life aboard the F/V Ultimate, faced a nightmare of violence from his crewmate, Buu Van Truong.

The trouble started with heated words—Buu hurling insults about Ha’s mother—but quickly turned savage. Buu launched a furious assault, pummeling Ha’s face and head with fists while accomplice Ly Van Hop pinned Ha’s arms, preventing any defense. Ha screamed for mercy, convinced he was about to die, until fellow crewman Tran Gioi intervened, pulling Buu off.

Bruised and bloodied, Ha barely escaped further blows as Buu spat threats of murder. Undaunted, Buu soon returned wielding a hammer, swinging wildly at Ha’s head and vowing to kill him on the spot.

Ha bolted to the adjacent F/V Misty, slamming the cabin door shut against Buu’s pounding fists and renewed death threats echoing outside. Finally, Buu retreated, stalking off with his allies into the night, leaving Ha huddled in fear but alive, the immediate peril seemingly over.

As dawn broke on June 8th, Ha's terror lingered—his ears ringing from the beating, his mind replaying Buu's promises of vengeance backed by a notorious, violent family. Unable to sleep or feel safe, Ha grabbed a .22 rifle from Misty's stores, concealed it under his jacket, and ventured out, determined to confront the danger before it resurfaced.

For more than an hour, he prowled the docked vessels, rebuffing warnings from others to back down. Spotting Buu returning from a nearby store—unarmed, groceries in hand, walking away from the boats without a hint of aggression—Ha stepped from hiding and opened fire. He unloaded 13 shots into Buu's back at close range, seven finding their mark and killing him instantly. Ha then ditched the rifle, swapped his bloodied shirt, and slipped away before the police arrived.

Charged with first-degree murder, Ha invoked Alaska's self-defense statute, testifying that his fear of imminent harm from Buu's earlier attacks and threats justified the shooting as a preemptive strike to end the cycle of violence.²

Here is the deal: even if you are the victim, you may be facing serious charges that can destroy your life financially, emotionally, and even take your freedom away. Please read this chapter with the utmost interest, especially if you are building up your level of readiness.

The Law of Self-Defense, written by Attorney Andrew Branca, heavily influences this chapter.³ I suggest you get a copy and read it (you can order it on lawofselfdefense.com or Amazon). It is the best book on the subject that I have found after thorough research and too many hours spent reading other books.

Attorney Branca truly cares about protecting lives and helping people avoid a legal nightmare. He is a firearm owner and competitive shooter. *The Law of Self-Defense* is written for an American audience but, in my opinion, will serve an audience of any country with local adjustments.

In this chapter, I will discuss the concepts that provide a legal basis for analyzing situations involving the use of force. We cannot cover each imaginable

jurisdiction. However, after reading this chapter and the presented examples, you will grasp the essential elements and be able to create your own strategy and guidelines for the various possible scenarios you may face.

Self-defense is primarily a legal term with a simple meaning: using reasonable force to protect oneself or others from immediate physical harm. It is a right granted to citizens in most legal systems, allowing them to defend themselves with force, including deadly force if necessary. This recognizes that every citizen is his or her own first responder.

There are usually one or more clear aggressors and one or more victims. The victims have the right to claim self-defense. In court, claiming self-defense carries a burden of production and is not always successful. Five essential pillars must be met for an act of self-defense to be considered justified. If any of these criteria are not met, the court may view you as the perpetrator.

I need to clarify this here. I am not an attorney. So please consider this chapter as entertainment. Please consult professionals to verify any of the suggested ideas presented in here. If ever asked about my authority in legal matters, I will happily claim to be just an enthusiastic author sharing his thoughts and findings with the world. My hope for this chapter is to provide likely legal self-defense angles. It is up to you to make your own choices.

Another important note: the exact legal implementation of each pillar varies greatly. In my opinion, they represent a moral stance that the justice system will examine. Once more, consult the laws in your jurisdiction. This chapter is not a replacement for your local legislation. The goal here is to highlight principles and present examples. If you agree to that, let us dive into the five pillars of self-defense.

For an exclusive interview with Attorney Branca and a cheat sheet summarizing this chapter, visit covertselfdefense.com/blackbook.

INNOCENCE

The concept of innocence plays a crucial role in the lawful use of self-defense. It states that the defender must not have been the one to initiate or provoke the conflict, and if they were, they must make an effort to withdraw from it. In other words, self-defense is only valid for those responding to unjust aggression, not for those who start it.

To put it simply, you cannot be the one who starts the fight and then claim self-defense. This may seem obvious, but there are times when it's not so clear-cut.

Scenario 1—Bar Brawl: Two people get into an argument at a bar, and it turns physical. Both parties willingly engage in throwing punches.

Question: Can either of them claim self-defense after injuring the other party?

Answer: No, because they both participated in the fight willingly.

Scenario 2—Road Rage Incident: Two drivers get into an altercation after a minor traffic incident. They both pull over and physically attack each other.

Question: Can either of them claim self-defense?

Answer: No, because this falls under the principle of mutual combat. If both parties are actively involved in the fight, it is not considered self-defense.

However, there may be situations where one needs to act preemptively for self-protection. This could be justified if there is clear evidence that one is in grave danger. Striking first does not necessarily imply guilt. As Attorney Branca points out, seeing someone else being aggressive towards you could be a compelling reason to defend yourself by striking first. It still needs to be reasonable in the eyes of an external party, and you will need to have a clear reason for striking first. Ultimately, it is up to individual judgment and understanding of ever-changing laws regarding self-defense.

A situation simulated in the *Ultimate Self-Defense Championship 3* is an example of where striking first may be the best option. A father is holding a four-month-old baby in his arms. A stranger keeps trying to get closer, even after the father firmly and loudly demands that he keep his distance. A preemptive, powerful strike may be the most reasonable option if no one comes to help and there is no safe escape.

Scenario 3—Altercation in a Parking Lot: A person becomes angry when they see someone has taken their parking spot. They confront the at-fault driver aggressively, initiating physical contact. The faulty driver responds by protecting himself, and the angry driver escalates further to avoid being hurt, injuring the faulty driver in the process.

Question: Can the angry driver claim self-defense?

Answer: No. It is hard to argue that taking someone's parking spot is a direct threat to one's physical integrity. The angry driver initiates unlawful aggression. Despite the need to escalate in trying to avoid being hurt badly, the aggressor cannot claim self-defense, even if the situation escalates beyond what was initially intended.

Now let us imagine this scenario goes to court. What evidence can the defender present to prove that they were not the initial aggressor? Unbiased witnesses? CCTV footage? Dash camera footage? Without such evidence, it can be difficult for them to defend against the accusations. None of the jury members or law enforcement officers were present, and now they need to reconstruct the story.

It may surprise a few readers, but in many jurisdictions, attacking a thief is not a good legal idea. In fact, our goods are often deemed less important than human injuries and are most likely to be insured. It can be different in the case of a robbery.

Scenario 4—Cutting in Line: Now imagine you are waiting in line for hours. You are having a bad day and just want to get tickets to surprise your daughter. Suddenly, a stranger cuts in front of you. No one says anything,

and he is alone. Your first reaction is to yell, “Get to the back of the line!” The stranger ignores you. You say, “Get out of here, or I’ll make you move.” Still no response. You push him out of line, and a fight with injuries ensues.

Question: In this situation, who can claim self-defense?

Answer: You were the one who started the physical altercation. You may have difficulty claiming self-defense if the stranger comes at you forcefully. How can you regain your innocence after you realize that you went too far?

Innocence can be regained.

Say the stranger comes back aggressively, and you see that he is about to punch you after you pushed him. You can shout that you do not want to fight and create distance quickly. Apologize for pushing him and lift your hands up in a defensive stance to show you do not want to fight. Showing that the danger is ‘gone’ for the victim is what matters. Make sure witnesses see that you are trying to disengage and ask the stranger to calm down. This may spare you from physical harm or a difficult defense in court if the other person insists on fighting, and you end up injuring them while protecting yourself.

This can be a complex situation, but it is an important one to understand. Innocence can be regained or lost for both parties involved. Depending on the jurisdiction, the initial aggressor may not be able to reclaim their innocence. Keep this principle in mind. As soon as you realize you have gone too far, show that you are no longer a threat. If someone comes at you even though you have withdrawn and apologized, you might be guilty for the first action, but you may claim self-defense for the reaction.

Scenario 5—Insults in a Restaurant: A man insults your wife in a restaurant, and when you ask him to calm down, he becomes aggressive. As he leaves, he insults your mother, and you get up and push him, causing him to fall and get seriously hurt. Although initially innocent, your actions may have opened you up to potential prosecution.

Scenario 6—Love Story: Tom confronts Jack about his undisguised interest in his girlfriend. The argument escalates, and Jack starts a physical altercation. When Tom feels overwhelmed and unable to dominate Jack after a couple of painful punches to his chest, he pulls out a knife, escalating the situation to a deadly weapon fight. This changes Tom's role from semi-good guy to bad guy.

It is important to keep in mind the consequences of using a weapon in an altercation and to make decisions beforehand rather than in the heat of the moment. Understanding what constitutes initial aggression can vary depending on the location, but it is always best to avoid starting or participating in any altercation and to refrain from escalating from verbal to physical or from fists to weapons. The deadly use of weapons is the ultimate escalation with the highest requirement to demonstrate innocence.

IMMINENCE

Imminence in self-defense requires that the danger a person is facing is immediate. The threat must be about to occur or currently happening, leaving no time for alternative actions. So, if you use force too early or too late, you may not pass the test of imminence.

Scenario 7—Good Samaritan: Someone is hurting someone else, and you go get a legal weapon and return to hit the criminal as he is leaving.

Question: Is this self-defense? You protected someone, right?

Answer: This action is unlikely to be considered self-defense. Instead, Attorney Branca's explanations in his book suggest that it is retaliation for your own sense of justice and that the police should handle the situation. The criminal leaving the scene means that the danger is in the past. Unless you have a good indication that the same person is going to imminently hurt someone else, it is better to just call the police.

Scenario 8—Not My Last Word: An argument turns violent between Jack and David. Jack throws the first physical attack. Punches are exchanged.

David is hurt and feigns stopping the fight. Jack is leaving the location because David seems defeated. As Jack turns around to leave the premises, David comes from behind and hits Jack in the head. In an effort to protect himself, Jack turns around with a violent kick to the torso and breaks two of David's ribs. David collapses.

Question: Who can claim self-defense? Is this mutual combat?

Answer: This altercation can be viewed as two separate events. In the first event, Jack is the perpetrator. But in the second event, David is out of danger because Jack is leaving. So, Jack can very likely claim self-defense in the second event. The tables are indeed turned. Retaliation or vengeance is not self-defense.

For a threat to be imminent, there is more than just a notion of *timing*. Massad Ayoob, a well-known American expert on self-defense law and practice, developed the concept of AOJ.⁴ The letter A stands for ability: Does this person have the ability to hurt me? Are they significantly larger or armed? The letter O stands for opportunity: Are there any objects or barriers between me and the attacker that could reduce their ability to harm me? And finally, J stands for jeopardy: Is there a clear intent to cause harm? Without a “yes” answer to all three, the threshold for imminence may not be met. This last aspect of jeopardy can be difficult to determine, as it often relies on evidence rather than intuition or feelings.

In Laura's story from Chapter 1, where she faces a possible threat at a distance, it can be hard to judge how much danger she is really in (jeopardy) and whether using pepper spray preemptively would be justified. It becomes even more complex with deadly weapons and the moral and legal complexities that come with using them in self-defense situations. It is important to be aware of the legalities and responsibilities that come with using force in self-defense, as the consequences can be irreversible.

AVOIDANCE

The concept of avoiding and potentially retreating in a situation makes logical sense, although there are often complex debates surrounding emotions and the duty to retreat. Let us not delve into that here; instead, we will focus on avoidance and non-aggressive behavior.

Avoidance is closely linked with ideas of proportionality and reasonableness. In certain American jurisdictions, you are only required to retreat before using deadly force, but in others, there is a duty to retreat, and some have no such obligation. This can lead to situations where, if someone shows aggression toward you and you have the opportunity to safely leave without using force, you should do so. “Stand your ground” states may eliminate the need for retreat entirely, but they still have strict guidelines for the use of proportional and reasonable force.

Scenario 9—Knife Woman Wants to Kill Him: Judy approaches Paul with a weapon while expressing her intent to harm him. Paul is standing next to his car with the door open and could just jump in and close the door to leave. But instead of leaving the scene, he chooses to draw his gun and shoot Judy in the chest. If he lived in an area where firearms are prohibited, he might decide to fight her with a baseball bat and severely injure her.

Question: Is this legal in a “stand your ground” state? This goes straight into murky legal territory.

Answer: The option of jumping into the car is the best *if* there is enough distance between Judy and Paul. The details will become crucial in determining the avoidance component. Is it ‘reasonable’ to think that Paul misjudged the time and distance for the attack? Was Judy walking toward Paul? By not avoiding the threat either by choice or necessity, Paul has positioned himself in an unfortunate situation that may entice a thirsty prosecutor.

In Canada, for example, there is no explicit duty to retreat; instead, it falls under the umbrella of reasonableness within the law.⁵ Basically, it is considered unreasonable if you did not attempt to retreat when possible and

safe before using force. Similar laws and interpretations seem to exist in England, Wales,⁶ and Germany,⁷ for instance.

Most experts I found agreed that retreating to avoid the use of force, when safely possible, strengthens one's self-defense claims.

One particular scenario where retreat is not necessary is within one's own home. This is known as the "castle doctrine." It allows individuals to use reasonable force, even deadly force, to defend themselves against intruders in their home without a duty to retreat. However, the criteria of proportionality and reasonableness still apply regardless of the location of the aggression.

Depending on where you live, the castle doctrine may extend to your backyard, garage, or even vehicles and commercial spaces. This can become complicated, but it is important to remain aware of it and know your rights. Shooting first and then asking questions may not be the best approach, even in a jurisdiction honoring the castle doctrine.

In Canada, there is no castle doctrine. This means that if someone enters your property, you cannot automatically assume the right to use force to remove them. For example, if someone is stealing your expensive television, it would not be acceptable to attack them. In such cases, it may be best to leave the house and call 911 for help. Of course, circumstances could lead to different decisions, such as when others in the house require protection for legitimate reasons.

To me, it seems obvious that you should *always* avoid a physical confrontation when it is safe to do so, no matter what the law says. Why? You or someone with you may end up in very bad shape, either physically or legally. Why risk this? Using objects like a car in a parking lot to create a physical separation might be all you need. Walking away is the mature and sensible thing to do. Let the police deal with it. Sometimes, it is simply not possible or safe, and fighting back is the only sensible option. Running away is not always easy or possible.

PROPORTIONALITY

The principle of proportionality is based on the idea that the response to a threat must be equal to the level of force being faced. This means using only the force necessary to neutralize the threat, without overexerting it.

Law enforcement has the authority to escalate the use of force, while citizens do not.⁸ If someone comes at us punching, in most jurisdictions, we cannot shoot them. Now, if the person punching is twice the victim's size, there is reason to use a force equalizer. This can be challenging to assess during a dynamic situation.

There are countless cases where, after neutralizing a threat, the victim keeps hitting the instigator: the infamous shot to the head to ensure the threat is no more, or continuing to punch someone's head after they are knocked out, or stabbing repeatedly after the victim is on the ground. The use of excessive force, especially after a threat is neutralized, usually turns a victim into a defendant, and self-defense may not be claimed in court.

The adrenaline dump that comes after a fight where one's life is threatened needs to be contained, as it can have dramatic consequences, irrespective of the initially innocent party.

This ties into the imminence pillar. Once the aggressor is neutralized or retreating, continuing to strike or harm them is no longer legally considered self-defense; it becomes assault or homicide.

In an ideal world, we would be able to match the level of threat with the appropriate tool. Lethal threats require lethal responses, while non-lethal threats call for non-lethal measures. However, in reality, things are not always so clear-cut. Even using something as seemingly harmless as pepper spray can lead to legal trouble, according to cases cited by Attorney Branca.³

So, what exactly constitutes a “lethal weapon”? In many legal systems, a lethal weapon (or ‘deadly weapon’) is defined as an object, device, or instrument that is capable—by its nature, design, or use/intention—of causing death or serious bodily injury. Some items are considered lethal weapons ‘per se’

(e.g., firearms or certain knives), while others may only be treated as lethal depending on how they are used. Courts often consider whether the use was reasonable, proportional, and whether there was intent.⁹

Any object used in a deadly manner can be considered one. For example, a baseball bat swung at someone's head could potentially kill them. However, the same bat might not pose as much danger if used to push someone (unless that push sends them in front of cars on a high-traffic boulevard). On the other hand, a seemingly innocuous item like a pen could also be lethal depending on how it is utilized; whether it is used to inflict pain or cause serious injury by targeting sensitive areas like the eyes, throat, or key arteries.

There often is not time to carefully consider which tool is appropriate for the level of threat. In a moment of panic or self-preservation, one may resort to using something as lethal as a knife or firearm in a non-lethal situation, especially if this is the only available tool at the moment. This not only escalates the situation but can also have legal implications, possibly depriving the victim of the ability to claim self-defense.

REASONABLENESS

In self-defense cases, reasonableness is a crucial factor. The actions taken must be objectively reasonable given the circumstances and level of perceived danger. In the case of Paul and Judy (Scenario 9), it would be difficult for Paul to argue reasonableness in using deadly force against Judy, as he possibly had a viable option to safely retreat.

Reasonableness is when the jury needs to look at the scenario, put themselves in the circumstances of the accused, and decide if the use of force is 'reasonable' for a person like the accused.

This principle is often in conflict with other principles like avoidance. The famous 2020 Colorado vs. Monroe case¹⁰ illustrates how someone can be found guilty based on the reasonableness of their actions. In the case of Sheila Monroe, she eventually won on the basis of no duty to retreat, but it took years in court to reach that conclusion.

In countries like Canada, reasonableness weighs heavily on a court case.

Acting reasonably is sometimes difficult. When a jury examines the situation from their perspective in a court of law, what seemed reasonable with high adrenaline levels and tunnel vision may actually appear unfavorable. The more evidence and witnesses, and the better we manage our legal pillars, the more likely we are to pass this test.

It is worth discussing the importance of threat versus distance in this section and referring to the Tueller Drill.

Whenever a weapon is involved, make sure to understand the 21-foot rule developed by Officer John Tueller.¹¹ He measured that based on the average draw speed of a police officer, a threat with a knife could cut them before they draw and shoot within 21 feet of distance. If you are bearing a firearm, you very likely already know this rule and understand that if there is a clear threat, you may want to draw before the threat reaches the 21-foot mark.

In fact, this rule was found to be an inadequate standard for officers to safely draw and fire their weapons when being charged by a suspect whose intent is to cause harm. The authors of a recent study¹² found that a safer distance of 32-feet gave a 95% chance for a police officer to draw and fire one shot before the attacker reached them. Understanding this variable may become essential in making informed decisions.

Each jurisdiction has its own rules about brandishing. If you carry a less-than-lethal improvised weapon like an Atomic Bear pen, you may want to draw it as soon as you can. These considerations may influence an assessment of the reasonableness of our actions. For your safety, it is very *important* to understand this.

Let us go back to the story at the beginning of this chapter. What do you think of Ha's actions? Did all five legal pillars support them? The superior court in Anchorage rejected Ha's claim, refusing to instruct the jury on self-defense. Evidence showed no ongoing threat: nearly 12 hours had elapsed since Buu's last advance, Ha had sought out and ambushed an unsuspecting, retreating

Buu, and the groceries indicated no intent to re-engage. By pursuing and striking first, Ha became the aggressor, forfeiting any defensive privilege.

The jury convicted him of the lesser-included offense of second-degree murder (mitigated by heat of passion from the prior assault), sentencing him to 20 years. The Alaska Court of Appeals affirmed in 1995 (*Ha v. State*, 892 P.2d 184), ruling that self-defense demands an immediate, unavoidable danger. This is a clear example that renewing the attack on a departing perpetrator, no matter the history, turns legitimate fear into criminal aggression. It broke the imminence pillar.

In this chapter, we have delved into five fundamental principles of self-defense that dictate when it is justified to use lethal force in defense of oneself: innocence, immediate danger, proportionality, avoiding confrontation if safe, and acting reasonably. These concepts are interrelated, demonstrating the gravity of the decision to resort to deadly force and emphasizing the need for careful consideration. It is not just a matter of being aware of legal guidelines; it also requires a deep understanding of morality in challenging circumstances. By familiarizing ourselves with these standards, we can make sound decisions regarding self-preservation that not only serve our own interests but also uphold fairness and responsibility.

For an exclusive interview with Attorney Branca, where we discuss in depth the content of this book, head to covertselfdefense.com/blackbook, where additional material for this book is offered for free.

SUMMARY

This chapter explains the legal foundation of self-defense, demonstrating that protecting oneself extends beyond survival—it is also about staying within the law. Drawing on real cases and insights from Attorney Andrew Branca, it reveals the five legal “pillars” that must all be met to justify the use of force. These principles form a practical framework for making sound, defensible decisions under pressure, ensuring that your actions in self-defense do not turn you from victim to criminal.

KEY TAKEAWAYS

- **Innocence Required:** You cannot start or provoke a fight and still claim self-defense unless you clearly withdraw and communicate disengagement.
- **Imminent Threat Only:** Force is justified only when danger is immediate and unavoidable; not before or after.
- **Avoid If Possible:** Retreat or de-escalate when it is safe; walking away strengthens your legal and moral standing.
- **Match Force to Threat:** Use only the level of force necessary to stop the attack; excessive response voids your defense.
- **Reasonable Actions Win Cases:** Courts judge your behavior through the eyes of a “reasonable person” under stress.

CHAPTER 3

THE PEN IS MIGHTIER THAN THE SWORD... REALLY?

*"Beneath the rule of men entirely great, the pen is mightier than the sword."*¹

—Edward Bulwer-Lytton

The room is quiet. Marie is still adjusting to the idea of sharing an apartment with a man she barely knows. He sits nearby, restless, sensing something he cannot name. Then the door bursts open. An assassin storms inside, and in an instant, the space fills with chaos.

There is no warning. No time to argue, no chance to escape. The assassin moves fast, knife in hand, aiming straight for Bourne. Furniture crashes; the walls seem to close in. Marie screams, frozen between fear and disbelief.

Bourne doesn't reach for a gun—there is no gun. He doesn't even seem to think through what he is about to do to defend himself. His hand searches blindly across the desk and lands on the most ordinary thing in the room: an ink pen.

The fight is ugly and close. The assassin is determined, well-trained, and strong. But Bourne's instincts take over. Gripping the pen like a blade, he drives it into the assassin's hand as he howls and recoils. The knife wavers while the pen bends and snaps, leaving ink and blood smeared across the scene.

For a moment, time slows. Marie sees not just a man defending himself, but something else—precision, training, a kind of knowledge she cannot put to words. Bourne himself looks shaken, as if surprised by what his own body has done. He doesn't remember his past, but his actions speak louder than memory: he is dangerous, and he is capable.

And all it took was a pen.

This scene from the movie *The Bourne Identity*² illustrates the use of an improvised weapon in self-defense. However, when trying to repeat the move and the strikes, I quickly realized that not all pens can be used the way Jason Bourne used his. Not only because of my lack of skill, which is a consideration, but also because of the type of pen.

What does it take for a pen to work in a fight? In this chapter, we will talk about pens and examine the qualities that make one stand out. At the end of the chapter, you will very likely have fallen in love with pens and will have a good idea of how to choose one that fits your self-defense and fighting needs.

THE PEN WE CHOOSE REVEALS SOMETHING ABOUT US

I have always had an affinity for a good pen. When handed a piece of paper to sign with a flimsy, stained pen at a restaurant or other establishment, I reach into my pocket and click my reliable, well-balanced writing tool into action. It leaves behind a smooth, elegant line and, despite years of use, is still in impeccable condition. I am not only avoiding germs and sickness, but I feel prepared and equipped.

From first responders filling out endless paperwork to novelists jotting down their next big idea, a quality ink pen holds both authenticity and practicality.

In times of emergency, when you need to jot down a license plate number on your hand quickly, your pen is there to save the day.

Many of The Atomic Bear's clients who have ADHD find solace in fidgeting with their pens to help them focus. Multiple studies support the relationship between sustained attention and fidgeting.³

Pens can also be a form of identity. Show me the pen you carry, and I will tell you who you are. The world's most expensive pen is the Fulgor Nocturnus by Tibaldi, which fetched a staggering \$8 million at auction.⁴ And then there's the Aurora Diamante fountain pen with a price tag of \$1.47 million.⁵ In 2023, the luxury pen market in the United States was valued at \$312 million and was projected to reach \$340 million by 2029.⁶ There are collectors out there!

On the other end, the London-based ballpoint pen artist James Mylne,⁷ creates masterpieces using inexpensive Bic ballpoint pens—thanks to their affordability, lightweight design, and long-lasting ink.

It is common for a pen to hold historical significance when used to sign an important document. For example, the Parker 51 pen that President John F. Kennedy used to sign the Nuclear Test Ban Treaty in 1963 is now on display at the John F. Kennedy Presidential Library and Museum in Boston, Massachusetts.

A person holding a quality pen exudes preparedness and professionalism. It also conveys that their signature holds weight, just like their words. A pen can inspire trust.⁸

Some pens even have multiple functions, like those from The Atomic Bear, and are equipped with flashlights, emergency window breakers, and styluses for touchscreen devices.⁹ Some pens can also serve as screwdrivers, levels, or measuring instruments. I have even seen pens with built-in laser pointers, small folding knives, or spy cameras. The possibilities are endless.

In other words, a pen is not only a practical everyday carry item; it is also pretty cool! After you read the following chapters of this book, you will discover its potential as an effective, less-than-lethal weapon.

Interestingly enough, the ballpoint pen is a relatively recent invention. The first mass-produced version, known as the Reynolds Rocket, hit the market in 1945 with a price tag of \$250 in today's money.¹⁰

Given the pen's relatively short history, it is no surprise that there have been so few established fighting techniques involving it. However, movie creators have taken liberties with using pens and pencils in combat or assassination scenes.

THE STRATEGIC BENEFITS OF A PEN FOR SELF-DEFENSE

Regarding self-defense, a ballpoint pen has numerous advantages that make it an ideal option. First and foremost, it is a non-threatening object. Unlike other tools such as knives, handguns, or pepper spray, a pen can be seen for what it truly is: a writing tool. You can confidently walk the streets with a pen in hand without fear of getting into trouble. You will not be accused of brandishing a weapon. However, beneath its innocent appearance lies a powerful self-defense tool.

One of the key benefits of using a pen for self-defense is its ability to act as a force multiplier. This means you can concentrate the striking or pressure force onto a small surface. Imagine the ink cartridge end as the pointy edge of a knife. By selecting a fine ballpoint ink cartridge, you can enhance the penetration and impact of your strikes. For example, striking sensitive areas like the throat or eye regions with a pen can effectively stop a violent attacker. The multiplication factor is equivalent to the surface area of your fist divided by the smaller, sharper edge of the pen, making it a formidable defense weapon.

Another advantage of pens is their built-in clip, which makes them easy to carry and access at all times. There are various ways to carry a pen, even when wearing pants without pockets. From pocketless shorts or leggings to pants pockets, shirt collars, jacket interiors, or exterior pockets—you name it! Compared to other types of weapons like tactical flashlights, which tend to be heavier and harder to conceal, you have many unrestricted options for carrying your pen. More on this in Chapter 10.

The compact size of pens and unassuming nature also make them easy to conceal. Whether held in your hands or safely tucked away in a small pocket, you have the element of surprise on your side. And, if needed, you can easily deploy your pen without drawing attention to it. This makes it the perfect weapon for various settings, including at work, where you can have your pen weapon hidden in plain sight. Pens are generally allowed without question, even at airport checkpoints—as long as they are not identified as “tactical.” Place your sturdier pen next to your regular writing tool, and you are good to go. I recommend always following any restrictions or regulations in locations such as courthouses, jails, concerts, schools, or sporting events.

Carrying a pen for self-defense is significantly safer than other weapons like guns or knives. The chance of unintentional discharge or serious harm caused to a third party is greatly reduced. This also means securing a pen is much less stressful, especially around children. And unlike pepper spray, there are no concerns about accidentally exposing yourself or others to its effects.

Lastly, strategically speaking, carrying a pen for self-defense is a no-brainer. Not only does it serve a practical everyday purpose, but its ease of carry and advantageous features make it an excellent addition to your layers of defense. Why not add this simple yet powerful tool to your arsenal?

LEGAL BENEFITS OF A PEN FOR SELF-DEFENSE

In his book *The Law of Self-Defense*, Attorney Andrew Branca writes:

“Anyone who prepares only for a deadly force threat sets himself or herself up for using excessive force if faced with a real, serious, non-deadly threat.”

But what about the use of deadly weapons? Aren't they the best option in a potentially dangerous situation? You are a resident of a gun-friendly U.S. state and believe that you only need your firearm. Let us take a look at some probabilities.

In 2020, according to the United States Department of Justice, simple assaults were reported three times more often than aggravated assaults as

violent crimes. Only 1 out of 4 reported assaults involved a deadly weapon. Attorney Branca's analysis in his book suggests this ratio is closer to 1 in 6. However, it's also important to consider that many simple assault and battery crimes go unreported. So, according to Attorney Branca, in reality, the ratio could be closer to 1 in 10 assaults being committed with a deadly weapon. Therefore, drawing and shooting a gun most of the time would not meet the proportionality criteria.

In *The Law of Self-Defense*, Attorney Branca adds:

“...even when you are legally allowed to use, say, a gun, if you can use non-deadly force instead, the results will be better for everyone—assuming, of course, that making use of the non-deadly option does not increase your jeopardy.”¹¹

This is where an everyday object, such as a pen, can come in handy. A pen designed for combat is typically non-deadly but can cause serious damage and potentially stop or slow down an attack. In trained hands, it can inflict grave bodily injury by targeting critical areas like the eyes or windpipe (see Chapter 12). It can also serve as a deterrent, keeping an attacker at bay. I have heard and read stories where the mere display of a pen was enough to discourage an attacker.¹²

However, the legality of using a tactical pen for self-defense is somewhat nuanced in jurisdictions like Canada, Australia, the United Kingdom, and many European countries.^{13, 14, 15} While owning and carrying a tactical pen is generally legal in these countries, its use must be justified within the pillars of self-defense outlined in local laws.

Once again, do not take my words as legal advice. The actual main reason to carry ANY pen is to write, not for self-defense. If you cannot write and have never driven a car, then carrying an Atomic Bear tactical pen with a glass breaker may suggest that you are carrying it as a weapon.

In other words, using an everyday object that you typically use for writing and that you used to save your own life may be perceived more favorably by a jury compared to other alternative weapons. This is especially true in

countries like Canada, where carrying an object for self-defense purposes is illegal. Once again, this is not legal advice, but rather my observations.

Interestingly, there was a 2004 court case in which a robbery was committed using a sharp pencil, which was deemed a lethal weapon by a California court.¹⁶ On the other side of the U.S., a court in Massachusetts¹⁷ did not recognize a pen used as a deadly weapon. These are the only court cases I could find involving a pen or a pencil as a weapon. The way it is used, even by the perpetrator, may or may not be established as a deadly weapon.

Cases involving a pen or pencil in a self-defense claim are rare. We can form hypotheses to explain this. First, the likelihood that a pen strike results in death or serious injury is low and, therefore, is less likely to be prosecuted. Secondly, techniques for effectively using a pen as a weapon are not widely known or utilized. Thirdly, those who do choose to use a pen for self-defense likely know how to avoid getting into legal trouble.

Therefore, while carrying a self-defense pen is not illegal per se, its use as a weapon should always be carefully considered within the context of reasonable force in self-defense situations.

CHOOSING OUR SELF-DEFENSE PEN

Countless skeptics have crossed my path, doubting the effectiveness of a pen. They scoff at the idea of a pen being more dangerous than their fists. I can guarantee that if they hand a pen to a four-year-old girl and hold still as the kid unleashes a barrage of pen strikes, they will quickly flinch or pull away.

As a designer of tactical pens, I have learned that there are crucial elements to consider when selecting a pen for self-defense. The two most important factors are weapon retention and the level of possible damage.

In Chapter 10, where we dive into pen grips with Doug Marcaida, you will discover the importance of having a non-sharp, sturdy back to your pen. This allows for added support in underhand and overhand grips without risking injury to your hand. Additionally, the grip surface is essential when dealing

with humidity or sweat. A decisive strike should be deliverable without losing control of the pen or causing harm to yourself. I have focused on this in my pen designs, particularly with the Stealth Pen Pro, which features a hard silicone back surface specifically designed for effective striking.

Another key aspect is having a narrow section on the shaft of the pen, which acts as a guard and improves retention. And, of course, the diameter of the pen's shaft plays a significant role in providing a solid grip; too slim, and it may be difficult to maintain a firm hold.

It is important to note that while a pen may not inflict as much damage as a knife or firearm, having an edge sharp enough for use without any activation can make all the difference in combat situations. Even using an extra-fine ink cartridge in a regular metal pen can be useful in close-quarters combat. That said, some tactical pens feature a tungsten glass breaker tip as their "business end," capable of causing significant damage. To truly test the potential of your pen, try striking any hard or semi-hard objects, such as wood or a punching bag. Increase the power of your strike and pay attention to when the pen begins to slip out or if you feel any pain in your hand.

The material of your pen is also a crucial factor to consider, not only for durability but also for weight and effectiveness. Titanium is an expensive yet lightweight and sturdy metal that makes for a great choice in tactical pens. Alternatively, aluminum can be sufficiently tough while being even lighter. The best aluminum options are 6061-T6 and 7075-T6. Stainless steel may be incredibly tough, but it is also quite heavy; an interesting solution for fighting, but a very poor one for everyday carry.

An exception on the market is our innovative Stealth Pen Pro. It is designed using a sturdy, weapons-grade polymer to maintain a comfortable yet secure grip while remaining the lightest tactical pen available. Unlike regular plastic, it will not break under pressure.

When selecting your tactical pen, remember that every aspect counts, from the design and material to its strength and versatility. The grip is essential. The desire to carry it every day is too.

Crafting a weapon is only half the battle. True mastery lies in the ability to train with it. Knives have knife trainers, and pepper spray has blank cans for practice. With firearms, you can hit targets at the firing range. But what about a pen?

With the Stealth Pen Pro and the Guardian, we designed a tactical pen that can transform into a trainer. The Stealth Pen Pro boasts a versatile design that allows users to train with a partner or on a punching bag without inflicting damage. This feature is crucial to carry out deployment techniques, striking comfort, and pen retention, as these movements are unique to each individual's writing instrument.

Size and weight play a vital role when choosing the right tactical pen. While some models may be heavier and offer more impact during combat, they can also create an inconvenience by causing pants to sag when not in use. A lighter pen provides greater comfort for everyday use and allows for quicker movements during training and combat.

Also consider the length of the pen. For optimal grip in an underhand position, I recommend a length of at least 15 centimeters (6 inches). Of course, this may vary depending on hand size; those with larger hands may prefer a longer pen. However, anything too long may hinder concealment or everyday carry convenience.

Speaking of carrying options, the clip on the pen is crucial. A good clip should provide enough tension to keep the pen secure but not so much that it makes deployment difficult. Various sheaths can also be attached to a belt for easy access. Choose a transport method that suits your needs; otherwise, you may find yourself leaving your fighting pen behind.

Let us remember the primary function of a pen: writing! Regarding ink cartridges, there are three main factors to consider: ink type, shape and ergonomics, and activation mechanism. While this may not directly relate to the pen's effectiveness in combat, it determines whether you will carry it with you every day. It is worth finding a pen and ink cartridge combination that works best for you.

The most common ink cartridge used in tactical pens is the Parker G2, defined by an ISO standard.¹⁸ However, many brands produce compatible cartridges, each with unique features, such as ink flow, drying time, and thickness. Try out different options until you find your favorite. And if your pen uses a different type of cartridge, do not be afraid to experiment with those as well.

When considering shape and ergonomics for writing, personal preference is a key factor. Some prefer a round barrel, while others may opt for a hexagonal or triangular grip. The weight and balance of the pen can also affect comfort during use, so it is crucial to find the right fit for your hand. Remember that what makes for a great fighting pen may not necessarily make for the best writing pen; it often comes down to finding a compromise between the two.

Tactical pen-making companies rarely go out of their way to test the writing ability of their pens. In the final stage of developing the Stealth Pen Pro, I asked ballpoint pen artist James Mylne to step outside his usual path and use the prototype to create an original piece of art—one he could sell for thousands of dollars. This was a way to get feedback on that design. He accepted the challenge. After twelve hours of drawing, he produced a stunning work that blends *Star Wars* stormtroopers with beach surfing.¹⁹ Maybe your scribbles don't sell for thousands, but take the time to test and choose your writing pen carefully. Over the years, you'll likely use it for hours on end.

The ink activation mechanism also matters. The options are limited: a screw-on cap, a click cap, a bolt-action mechanism (where a side button slides to push out the cartridge and back in again), a retractable mechanism (also known as a click pen), or variations of these options. The need to deploy a pen as a weapon quickly under stress requires the design to place the business end at either the writing tip or the opposite end.

In the past, there were only two options: the writing mechanism would be a twist or bolt action, with the business end on the opposite side of the pen, or you'd have to remove a cap to write with the pen. The advantage of bolt

action, twisting, or clicking mechanisms is their ability to activate quickly; even one-handed with your thumb. Very convenient.

You can find an illustration of these features, where I show the Guardian, one of the pens I co-designed in my company, The Atomic Bear.

As we will see in Chapter 10, the best grips require a flat surface on the opposite end of the business end or at least one that can withstand pressure comfortably. A click pen does not pass this test, nor do twisting options. Therefore, I believe a fighting pen should have an impact side on one end and a flat surface on the other. Most tactical pens with caps meet this requirement. When I designed the Stealth Pen Pro and the Guardian, I incorporated a fast bolt-action mechanism and created a business end on the writing side. This way, both requirements for quick and one-handed ink activation as well as fighting needs are met.

In summary, we have examined important factors when choosing a pen suited for combat: the availability and stability of grips, the ability to withstand shocks, the weight based on size and materials used; how easily it can be carried; the quality of the clip and its ability to deploy quickly, regardless of how it is carried; the ability to train with a partner or target; how comfortable it feels when writing; and how the ink deployment mechanism affects grip and writing experience. With this knowledge, you should be able to select your ideal pen. Of course, price is a factor, but if you plan on keeping this pen for a long time, it becomes an investment and an essential part of your defense system.

To learn more about tactical pens, visit theatomicbear.com. You can find free and very useful content to complement this book here: covertselfdefense.com/blackbook.

SUMMARY

This chapter shows that an ordinary pen can be a practical, low-risk, every-day-carry defensive tool when chosen and trained intentionally. It covers why pens work as force-multipliers, the legal and ethical advantages of

non-deadly options, and the specific design, material, and ergonomic features that make a pen suitable for self-defense and daily use.

KEY TAKEAWAYS

- **Improved Weapon Value:** A pen concentrates force on a small surface to stop or deter an attacker.
- **Low Legal Risk:** Pens are less likely to be treated as deadly weapons—use remains more defensible.
- **Carryability Wins:** A pen is easy to carry, conceal, and access compared with heavier tools.
- **Design Matters:** Material, grip, shaft diameter, length, and clip affect retention and striking.
- **Proportionality Advantage:** Non-lethal options reduce legal and moral fallout compared to guns/knives.
- **Training Is Essential:** A pen is only useful if you train strikes, retention, and deployment.
- **Respect Local Laws:** Carrying for self-defense may be treated differently by jurisdiction.
- **Carry Habit:** Carry the pen daily for 30 days to make deployment a muscle memory; log any comfort and access issues.

CHAPTER 4

THE COVERT ARSENAL: HOW A PEN RANKS AMONG WEAPONS

*"If the only tool you have is a hammer, you tend to see every problem as a nail."*¹

—Abraham Maslow

He had everything on him that night: a pistol tucked under his jacket, a folding knife clipped to his pocket, and a can of pepper spray dangling from his keychain. He carried them the way some people carry an umbrella; out of habit, out of fear of being caught unprepared. But when the stranger on the subway car lunged at him, none of those weapons felt like the right choice.

It was just past midnight on the last train home. The young man sat alone at one end of the car, earbuds in, backpack at his side. At the other end, a man paced back and forth, muttering under his breath. Every so often, he shot a glance in the young man's direction, his eyes unfocused but locked on him all the same. When the train lurched between stations, the muttering stopped. The man started moving—deliberately, step by step—until he was only feet away.

The first shove came out of nowhere: hard, fast, aimed at the chest. Then a torrent of words—curses, threats, spit flying. The young man's heart raced.

Instinctively, his hand brushed the pistol under his jacket. But he froze. Firing a gun here, in a crowded underground tunnel, would echo like thunder, draw police, and maybe kill someone who didn't deserve it. His knife was sharp, but the thought of slashing open a stranger's body turned his stomach. Pepper spray? In a subway car, the mist would hit everyone, including himself.

So, he reached for something else. Something simpler: the pen clipped inside his jacket pocket. He gripped it like he would grip his phone, steady and firm, and waited. When the aggressor shoved him again, leaning in close, the young man jabbed the pen hard into the man's forearm while protecting his head. Not a killing strike, not a cinematic takedown—just a sharp, shocking pain. The aggressor yelped, clutching his arm, stunned by the sudden sting. That single second was enough.

The young man slipped past him, darted through the subway doors as they opened at the next stop, and vanished into the crowd of late-night commuters. His heart pounded, his hands shook, but he was safe. The pen was still in his hand, capped again, no worse for wear.

Later, replaying the scene, he realized something important: the pistol, the knife, the spray—all would have escalated the fight, made it bloodier, more dangerous, maybe even fatal. The pen, though, was different. It gave him the edge he needed to escape without crossing a line he could never uncross.

When planning your defense, several key factors should be carefully considered. Each decision could be a matter of life or death—a matter of freedom or a lifetime sentence. There are multiple options, and finding the ones that best suit us is a challenge. In this chapter, I will share why counting on a pen makes sense in most situations. Here, I am not suggesting that you should rely solely on a pen! Having this rounded approach to self-defense is important, and understanding the limitations of different types of weapons is crucial.

Adding a pen to your arsenal might help you respond to a threat with an appropriate level of force. Depending on where you live, you may not have the possibility to carry most of the weapons I am discussing. If you do, then

you may not have room to carry more than one or two. Making the right pick is then even more important.

LETHAL OPTIONS

Almost anything can become deadly if used with enough force and intent. Even seemingly harmless objects like hammers, screwdrivers, and baseball bats can inflict lethal harm when wielded with malicious intent. A swing with a baseball bat meant to push someone away does not carry the same weight as a swing aimed at crushing someone's skull. Let us first discuss weapons that are inherently deadly and cannot be used in non-lethal ways. For the sake of brevity, let us assume we are talking about standard models of each weapon rather than specific variations.

FIREARMS

Let us start with the most apparent form of deadly force: guns. If you live in the United States, you may have the right to carry a firearm for self-defense.² However, this privilege is only granted to an 'ordinary' citizen in a few other countries worldwide, such as the Czech Republic³, South Africa⁴, the Philippines⁵, Guatemala⁶, and Yemen⁷. In most other countries, carrying a firearm for self-protection is prohibited.

If you do choose to carry a gun, you likely possess knowledge about when it is legally justified to use it for self-defense: when faced with an immediate and lethal threat where no other option for survival exists.

But what exactly qualifies as an imminent deadly threat? This is where things become complicated and require some serious thought. For example, having someone point a gun at you from any distance would undoubtedly qualify. But what if someone is brandishing a knife within 20 feet of you and threatening to kill you? Would a large and aggressive person walking toward you be considered an imminent deadly threat if you are small and physically vulnerable? What if there are two attackers? These are all critical questions to consider, as the answer may hold the key to your legal defense in case of a shooting.

Ultimately, it comes down to whether a reasonable person in the same situation would believe their life is in danger. And even then, depending on local laws, you may have a duty to retreat before resorting to deadly force.⁸ As we learned in the chapter on the law of self-defense, there are many nuances and complexities involved.

Considering the distances at which lethal attacks happen informs us about the type of weapon we may want to prepare. In a 2019 LEOKA study,⁹ 28% of law enforcement officers were injured with a weapon at a distance of 0–5 feet, and 46% were injured within 10 feet. When examining police officer deaths caused by weapons, 38% occurred at a distance of 5 feet or less.¹⁰ This information, along with reaction time concepts, is summarized in **Figure 1.1**. I could not find this data for non-law enforcement cases.

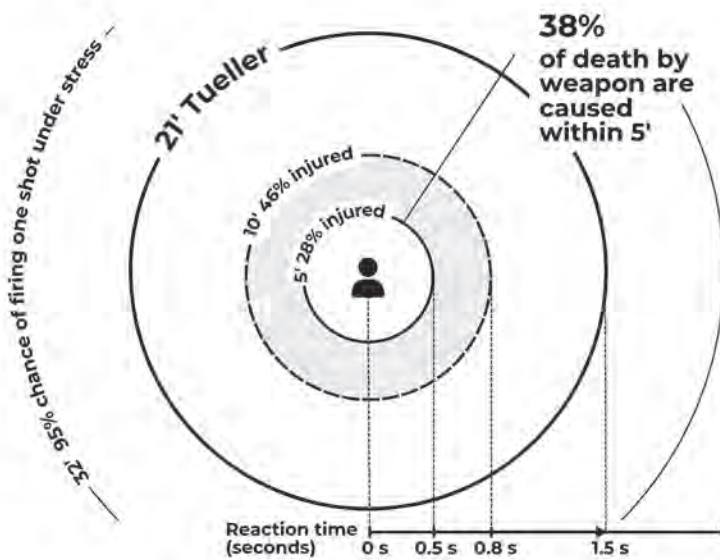


Figure 1.1—Integration of the LEOKA study, Tueller Drill, and recent data showing that 38% of officers killed and 28% of officers injured were attacked within 5 feet, while 46% of injuries occurred within 10 feet. The data underscores how reaction time and distance are critical to surviving a violent encounter.

This begs the question: When is it okay to draw your firearm if the attacker ambushes you? The time will be much shorter compared to when one has to draw a handgun. Close combat skills might be necessary to retain a firearm

or draw at the right moment. Losing that weapon to an attacker could also be a plausible outcome.

The truth is, using a gun to shoot someone is a decision that will likely alter your life forever, as well as the life of the person you harm. It comes with a high price tag, both financially and emotionally. That is why any reputable self-defense lawyer would advise you to only use lethal force when absolutely necessary; when your own life or the life of someone under your protection is truly at risk. In those dire situations, a handgun may be your best bet for survival.

Another crucial aspect to consider is the risk involved. In 2022, according to the Johns Hopkins Bloomberg School of Public Health, firearms killed more children and teens ages 1–17 than any other cause, including motor vehicle crashes and cancer.¹¹ In 2023, according to the Pew Research Center, 58% of gun-related deaths were suicides, totaling 27,300 suicides in one year. In the same year, 38% were murders (17,920). The remaining gun deaths involved law enforcement (604) and accidental discharge (463).¹² **Figure 1.2** illustrates this distribution. During the same year, 1,217 defensive gun uses were counted by the RAND organization.¹³ This last statistic varies significantly depending on how it is counted and who publishes it.



Figure 1.2—Gun-related deaths in the United States in 2023 as recorded by the Pew Research Center.

A number that got me thinking: gun owners are 2 to 10 times more likely to die from suicide than non-gun owners.¹⁴ This factor depends on the age of the population segment and how the firearm is stored. We all go through dark moments. Quick access to a definitive means is an additional risk factor.

Thus, carrying a firearm implies the highest level of responsibility and risk for yourself and the people around you. The way you store it and the way you carry it matter. Are there children around you at times? Another aspect often neglected is the risk of relying on a firearm for situations that do not require it, just because it is your go-to defense. Are people carrying a firearm well-trained? Unfortunately, not always.¹⁵

KNIVES

The legality of carrying a knife for self-defense becomes increasingly complicated across different jurisdictions and countries. Each jurisdiction in the United States has its own criteria and regulations, as is true in other countries. Germany, for example, allows citizens to carry a 4-inch fixed-blade knife but prohibits a 3-inch folding blade.¹⁶ The logic behind these specific restrictions may not be immediately apparent. The type of blade, whether it locks or not, and whether it is double-edged, are all important distinctions in the eyes of the law.

It is no surprise that knives are considered deadly weapons and, therefore, have a higher standard for their use in self-defense. Simply bringing one into a fistfight is unlikely to be considered proportionate by a court. Using it to intimidate an attacker could land you in legal trouble for brandishing a weapon.^{17, 18} Additionally, relying on a lethal weapon can create a psychological barrier for some people when faced with the decision to harm another person.¹⁹

For those who experience this moral dilemma, a pen can be a great alternative. We may only truly understand the danger of a knife after training with someone who can demonstrate its full capabilities and potential consequences. This highlights the importance of proper training and creating new experiences in a safe environment to prepare for potentially life-or-death situations.

I personally tested different combative systems using knives. To name a few: Doug Marcaida's Kali, ShivWorks, and EliteYou. Understanding the damage caused by cutting a major artery makes you realize the level of force that a knife can represent when used well. If you decide to carry a knife, please do me a favor and learn to use it and when to use it. Any of the above-mentioned schools, and many more, will guide you to become more proficient.

Solely relying on deadly weapons can have undesired consequences. In reality, non-deadly threats are far more likely to occur than deadly ones. This is where less-than-lethal options come into play.

LESS-THAN-LETHAL OPTIONS

As discussed in Chapter 2, you are more likely to face an imminent non-deadly threat than a deadly one. Therefore, preparing only for a deadly response is not wise. This is where less-than-lethal options come into play. If you live in a more restrictive area, it may be your only option.

KNUCKLE DUSTERS

Brass knuckles (also called knuckle dusters or knucks) are a hand-held weapon designed to fit over or around the fingers to reinforce the user's punch. Typically, they are made from metal (such as brass, steel, or aluminum) or high-strength polymers, and they consist of a curved plate with finger holes that the user slips their fingers through, leaving a solid bar of material across the knuckles. This construction concentrates the force of a punch onto a smaller, harder surface, increasing the potential for injury and also protecting the user's hand from impact.

Many jurisdictions treat brass knuckles as a prohibited or restricted weapon because they are considered designed primarily for offensive or injurious use rather than utility. Strangely enough, they are legal in only 14 states, allowed with a permit in 12 states, and prohibited in most states.²⁰ They are also banned in many countries. They can be challenging to use correctly and can be a devastating weapon if used properly.

PEPPER SPRAY

Pepper spray is widely used for self-defense in the United States. This small canister holds a powerful substance called oleoresin capsicum, which can cause temporary blindness, difficulty breathing, and intense burning upon contact with the skin. The effects of pepper spray typically last for a few minutes to an hour, depending on the strength of the mixture and the individual's sensitivity to the substance. When used in optimal conditions, it can be a great tool.

Pepper spray is legal in all 50 of the United States, although some may impose restrictions on the size of the canister or the minimum legal age to carry it.²¹ Many countries worldwide make it illegal to carry, such as Canada and the UK, but it appears to be permitted in countries like Italy, France, the Czech Republic, Spain, Austria, Poland, Hungary, Latvia, Romania, Serbia, and Russia. In some countries, bear-specific pepper sprays are permitted but cannot be carried in public.

It is essential to understand that pepper spray may not have the same effect on every person or situation. Factors like wind strength, distance from the target, pain tolerance, and the influence of drugs or alcohol can significantly impact its effectiveness. During my research, I spoke with numerous women who carry pepper spray in their purses for protection.

The key element of pepper spray is how fast you can deploy it. Ideally, it should be ready to use within 1–2 seconds. According to Sabre®, a reputable manufacturer, pepper spray is most effective when used within 6–12 feet and targeting the attacker's eye region. This means that individuals should train specifically with their chosen pepper spray brand since aiming at a distance can be difficult, and accounting for wind is crucial to successful use.

Distance plays a significant role in the effectiveness of pepper spray as a self-defense tool. It should only be used when a legitimate threat is present and should not be underestimated, as it is a potent weapon.²² Therefore, one must make the decision to use it well before being 6–12 feet away from the attacker, taking into account the time required for deployment. Based on the Tueller Drill, which measures how quickly an attacker can reach a target

from 21 feet away, we know that, on average, it takes about 1.5 seconds for someone to close this distance. This leaves less than one second to activate the pepper spray while the threat rushes toward you.

I challenge anyone to accomplish this task unless their pepper spray is already in hand and ready to use before the attack begins. In some cases, simply displaying or warning an attacker that you have pepper spray may be enough to deter them and prevent an attack. There are countless videos of the effective use of pepper spray on the internet. They all involve distance and time between the aggressor and the defender.

If you spend enough time researching the use of capsicum, you will find many creative devices. Some companies have created devices that resemble guns and shoot pepper spray projectiles, but Attorney Branca warns against using them on his website.²³ The risk of mistaking a real handgun loaded with live ammunition for a pepper spray device, especially in a high-pressure situation, could lead to disastrous consequences, namely justifying the use of lethal force against you, given that it is reasonable to believe that this pepper spray handgun is an actual deadly firearm and that you are about to use deadly force unlawfully.

As an aside, using a BB gun has the same potential risk of escalation toward deadly force. Someone could lawfully defend themselves with deadly force once they see a firearm. A bystander may not understand the disparity of force being used and decide to protect a citizen by using deadly force... in all 'reasonableness.'

Carrying pepper spray can also be seen as aggressive in certain situations and may pose a risk if accidentally discharged by a child.

Two last limitations of pepper spray: you may not want to use it indoors unless you have a quick escape route. Check the expiration date of your canister, as the shelf life of pepper spray ranges from two to four years, depending on the manufacturer.

PEPPER SPRAY VS. PEN

A key distinction between pepper spray and a pen is the effective distance between you and the assailant. The pen is used daily and does not appear to be a threat. It has no expiration date, is easy to carry, and can be quickly deployed. It is more unassuming. The pen requires more skill to be used effectively against a threat, but it is easier to train with.

A pen is also likely to be socially acceptable in various settings, such as at work or when visiting friends. It is allowed in many more places, and is unlikely to hurt its owner. And it is more useful in our everyday tasks. It does not cause any issues when crossing borders, traveling to new countries, provinces, or states. The only advantage of pepper spray, in my opinion, is in that distance range where you can use it effectively. It may prevent a close encounter while being non-lethal.

OUR ABILITY TO FIGHT

At the end of the day, your mind and body are your ultimate weapons for self-defense. Learning how to de-escalate situations and avoid becoming a target is crucial. While having knowledge and skills in martial arts can certainly give you an advantage in a violent encounter, it is important not to become overconfident and engage in unnecessary physical altercations.

Training and testing your abilities with experienced experts can be highly effective in preparing for unexpected situations. Ultimately, the difference between martial arts and self-defense lies in the practice and mindset. Self-defense focuses on survival and applying the minimum force necessary. Martial arts is a practice of optimal use of force against an opponent with similar aptitudes and, in most cases, within the context of rules.

As a practitioner of Brazilian Jiu-Jitsu, I have learned the importance of self-defense techniques through my training with the Gracie Barra school. The beginner curriculum emphasizes both sports and self-defense techniques. Knowing a few high-probability and simple techniques very well

can make all the difference in a street fight or real-life situation. And that is where experts like Mike Donvito and his team at EliteYou or Craig Douglas from ShivWorks excel in preparing individuals for self-defense in realistic scenarios. I highly recommend looking for opportunities to develop your skills, like at the *Ultimate Self-Defense Championship* retreat, edition 2025, which I had the privilege of attending. It was one of the most productive ways I have ever experienced to learn and apply contextual fighting techniques.

Are you considering dedicating time to training and practicing a martial art? This is an excellent idea! However, the choice of which art and where to train is crucial. Some martial arts can give you a significant advantage in a physical altercation, allowing you to end the fight quicker and with less harm to yourself and the aggressor. However, when it comes to self-defense, the goal is not to win the fight but rather to survive it with minimal damage and potential legal consequences. As Jocko Willink said in his podcast, *The Jocko Podcast*, “If you are on the street and someone picks a fight with you, your first instinct should be to run away. Even if they try to kick or punch you, you still have options to escape. But the moment they grab hold of you, those options are limited. You must regain the opportunity to flee by countering their grapple using techniques like wrestling, standing Jiu-Jitsu, or Judo.”²⁴

Failure to avoid a physical altercation could also affect your innocence. In situations where determining who instigated the fight is not clear-cut, knowing how to defend yourself can be crucial in proving your innocence. Therefore, understanding how a jury may perceive a fight and incorporating that into your strategy is essential in avoiding or winning the legal battle.

When considering which martial art to study for self-defense, many options often come up: Brazilian Jiu-Jitsu, wrestling, judo, boxing, kickboxing, or Muay Thai. The variety can be overwhelming, so how does one choose the right fit?

In recent years, there has been much discussion about “McDojos”—dojos that prioritize quantity over quality and promote students regardless of

their skill level. Ask yourself if the techniques taught in these dojos are used in combat competitions like MMA and if they have been pressure-tested against resisting opponents. This ultimately comes down to your reason for practicing martial arts; if it is solely for physical form and fitness, the style may not matter as much. However, if your goal is to build self-defense capacity, selecting a reputable and effective martial art is crucial.

An example of a martial art that may not be the most appropriate for self-defense is Aikido. This was the case for my friend Rokas Leonavicius from the YouTube channel *USDC by Rokas Leo* and creator of the *Ultimate Self-Defense Championship (USDC)*. Despite becoming a respected black belt in Aikido and opening his own school, he eventually realized that this martial art would not be effective against real-life threats. He then made the courageous decision to close his school and focus on training in martial arts with proven self-defense applications.

Take your time selecting where to train and what to learn to start your journey toward self-defense. It will improve your physical condition, allow you to meet like-minded individuals, and prepare you to protect yourself and your loved ones.

Most people lack the discipline to learn how to fight. An important question is: what can you do that will give you an advantage if forced to defend yourself? Carrying a weapon might seem the most obvious answer. Truth be told, fighting with any weapon also requires a minimum level of mastery. With this book, I hope to guide you to some level of mastery in using a pen to defend yourself. Currently, there are very few serious resources and references available.

THE PEN

We have already discussed why a pen is a valuable addition to everyday life. An inconspicuous weapon that can be carried almost anywhere provides peace of mind. In the hands of a skilled fighter, a pen can be a devastating tool that enhances nearly every technique; from defensive counters to aggressive strikes. The Atomic Bear pens that I created are designed with fighting in mind.

Many people share their doubts about using a pen in self-defense. Can it have the necessary stopping effectiveness? Can it actually hurt an assailant? How do you use it effectively? This is why we should not pick any weapon and believe that we are protected.

In the upcoming chapters, I will demonstrate how people effectively utilized their pens in multiple stressful situations. In the second season of the *Ultimate Self-Defense Championship*, not all defenders successfully defended against knife attacks using their Stealth Pen Pro. Similar observations were made in the third season. These experiences will be further explored in future chapters.

Whether you are a grappler or a boxer, a pen can amplify the power of your strikes and be used for hooking and inflicting pain. Natan Levy, a former UFC fighter, explained to me that having something the size of the Stealth Pen Pro inside your fist greatly protects your hands when punching.²⁵ Knowing how to fight increases your chances of success with any weapon. Practitioners focus on these techniques because they have been pressure-tested against determined opponents and have a higher probability of success.

Basic wrestling techniques combined with drills specific to weapons are essential for increasing your chances of success when facing an attacker wielding a weapon and when using a weapon yourself for defense.

When it comes down to it, the most dependable means of protecting yourself lies within your own body and mind. It all begins there. Of course, having a weapon can increase your chances of survival in more challenging situations. However, relying solely on a weapon, such as a firearm, without proper training and in a dynamic physical altercation with an actual threat, is likely not the most effective strategy. Failing to have a plan for hand-to-hand combat when no weapon is available can lead to dangerous consequences. However, having control over yourself and the ability to become lethal when absolutely necessary for your survival is certainly an advantage worth having!

SUMMARY

This chapter compares various self-defense tools—lethal, less-than-lethal, and improvised—and explores where a pen stands among them. It shows that while guns, knives, and sprays have power and reach, the pen offers unmatched accessibility, legality, and proportionality for everyday defense. True preparedness lies in layering tools and skills, not in relying on any single weapon.

KEY TAKEAWAYS

- **Pen vs. Firearms:** Guns provide lethal stopping power but carry heavy moral, legal, and safety risks. A pen offers a proportional, low-risk alternative for non-lethal encounters.
- **Pen vs. Knives:** Knives can end fights quickly but are difficult to justify legally and psychologically. A pen mimics some of the mechanics without crossing lethal thresholds.
- **Pen vs. Pepper Spray:** Pepper spray offers range but fails in enclosed spaces, against wind, or if not instantly ready. A pen is faster to deploy and always legal to carry in most contexts.
- **Pen vs. Knuckle Dusters:** Brass knuckles are banned in most jurisdictions and designed for injury. A pen is discreet, dual-purpose, and unlikely to be viewed as an aggressive weapon.
- **Pen vs. Empty Hands:** A pen turns your hand into a force multiplier, protecting your fingers and amplifying impact, while remaining an everyday writing tool.
- **Pen vs. Overreliance on Weapons:** Weapons fail without skill. Situational awareness, training, and decision-making remain the core of real-world self-defense.

DILEMMAS

THE PEN AS AN IMPROVISED WEAPON

NON-DEADLY BY DESIGN

CAN BE CARRIED ANYWHERE

EVERYDAY USE

UNASSUMING

EFFECTIVE

SOCIALLY ACCEPTED

IS THIS TIME FOR A PRE-EMPTIVE STRIKE?

AM I WITHIN MY RIGHTS TO USE THIS LEVEL OF FORCE?

AM I READY TO HARM THIS PERSON IN SELF-DEFENSE AND ACCEPT THE CONSEQUENCES?

DO I REALISTICALLY HAVE THE SKILLS FOR THIS?

WILL MY SOCIAL PROGRAMMING OVERRIDE MY INSTINCT?

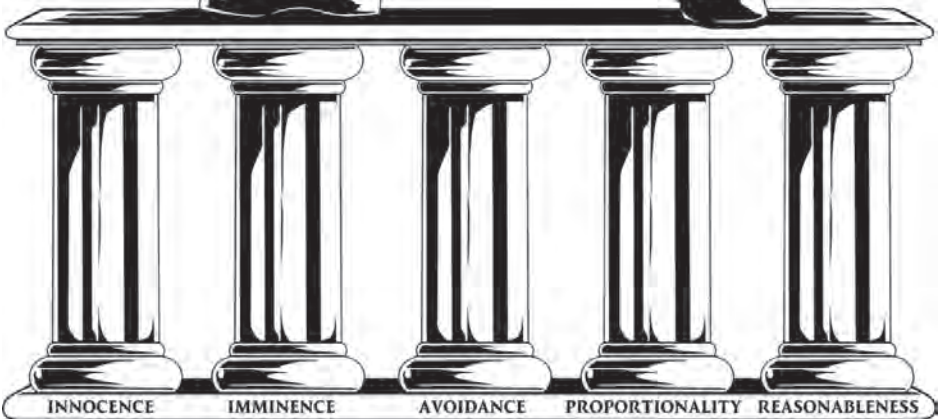


Figure 1.3—Part I Summary Illustrated

ANATOMY OF AN EFFECTIVE FIGHTING PEN

THEATOMICBEAR.COM

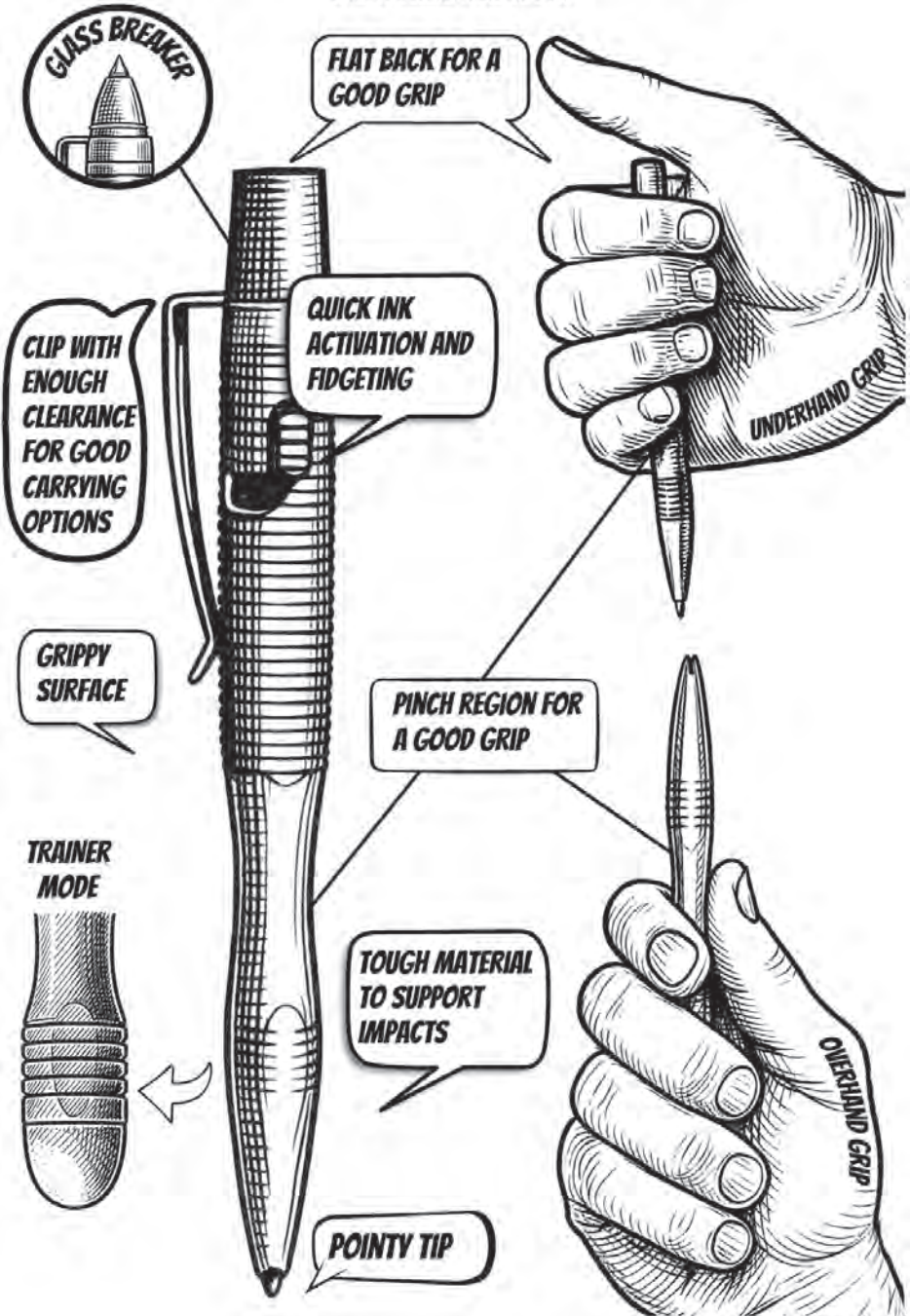


Figure 1.4—Anatomy of an Effective Fighting Pen

PART II

THE STEALTH WARRIOR

Mastering Awareness, Psychology, Control, and Speaking Wisdom

To fight without being seen, you must first master the terrain of the mind.

This section will teach you to read your environment, manage fear, and dissolve aggression before it escalates. You will learn the art of invisibility—walking through the world unseen, yet always prepared.

ACKNOWLEDGMENTS

“Individual commitment to a group effort—that is what makes a team work, a company work, a society work, a civilization work.”

—**Vince Lombardi**

This book would not have been possible without the collaboration, insight, and support of countless people—instructors, students, friends, and readers who believed that self-defense can be ethical, smart, and effective. To each of you, my deepest thanks.

Many people offered valuable feedback on early versions of the manuscript: **Kirsty Verity**, **Eden Bullock**, **Georgia McGaughey**, **Philip Asfour**, and **Yann Bernard**.

I’m deeply grateful to **Kenneth Vitale** for sharing his wisdom in the chapter on situational awareness, and to **Tom Mandrake** for his beautiful, accurate technical illustrations. Tom’s ability to capture a technique from video and translate it into clear, expressive frames was an invaluable asset. Thank you to **Damian Augustyniak** for illustrating the concepts in Parts I, II, and IV.

My sincere thanks go to **Doug Marcaida** for his knowledge, generosity, and words of encouragement. Doug devoted extraordinary time to this project, and I’m profoundly grateful for his willingness to collaborate on the technical aspects developed in this book.

Esther Kiburi, my sincere appreciation for line editing this book on very short notice while preserving my voice. **Steve Shimchick**, thank you for proofreading this manuscript so thoroughly and so quickly. Thank you, **Max Kolpak**, for the beautiful book interior design.

To **Rokas Leonavicius** from *Ultimate Self-Defense Championship*, thank you for your creativity, friendship, and inspiration. Rokas is a gifted storyteller and lifelong martial artist who helped shape my thinking as I wrote. Contributing to his creative ‘madness’ has been both a privilege and a joy.

I owe deep gratitude to **Attorney Andrew Branca** for taking the time to meet with me and answer my questions. His book *The Law of Self-Defense*, 3rd Edition clarified a subject too often buried in complex legal language and helped me build a grounded perspective on the legal realities of self-defense.

I also wish to thank my self-defense instructors, starting with **Demetrios Diavatopoulos** from Gracie Barra Saint-Laurent, and the entire team there for teaching Brazilian Jiu-Jitsu and its self-defense applications. To my late fencing coach, **Fleurette Campeau**, thank you for nearly ten years of training and support during competition. Your influence lives on in the Olympic fencing chapter.

A special thanks to **Craig Douglas** from ShivWorks and his team for shaping my approach to real-world encounters and showing me how fencing principles apply even without a sword. I highly recommend their *Edged Weapon Overview* workshop.

To **Mr. X** (he knows who he is), thank you for testing techniques and sharing your professional insight during the *Ultimate Self-Defense Championship Retreat 2025*.

My gratitude to **Mike Donvito** from EliteYou for challenging my views on the level of force sometimes required in a violent encounter, and to **Mike Pesesko** of *Hard2Hurt* for sharing his techniques and insights into pen-based defense. Mike’s YouTube channel is a constant source of knowledge and inspiration that influenced several ideas in this book.

To **Travis Roesler**, thank you for your generosity in teaching your methods and vision of the tactical pen as a tool. Few people know this, but you are the reason I kept pushing the development of the *BearGrip Magnetic Mount™*, even when prototypes were failing.

To **Adam Lyons**, thank you for sparking the idea that became this book.

To my daughter **Julianne**, thank you for your encouragement, for filming the fencing content, and for posing in the “Ways to Carry a Pen” section.

To my daughter **Catherine**, thank you for your curiosity, your listening ear, and your encouragements.

To the **Atomic Bear** community, thank you for helping choose the title and cover, and for your constant encouragement and support.

And to you, the reader—thank you for buying this book, reading it, and sharing it. Together, we can make the world a more beautiful and safer place, helping others enjoy it fully.

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ABOUT THE AUTHOR



Jean-François “Jeff” Truchon is the founder and CEO of *The Atomic Bear*, where he develops innovative, practical tools that help ordinary people become their own first responders. His work blends modern engineering with a deep respect for martial arts and ethical self-defense, empowering individuals to act with confidence and restraint.

Before launching *The Atomic Bear* in 2017, Truchon built a career in computational chemistry, earning a PhD from the *Université de Montréal* and contributing to research on osteoporosis, inflammatory bowel disease, and cancer. He is the author and co-author of several patents and peer-reviewed scientific publications.

A lifelong student of movement and performance, Truchon holds a blue belt in Brazilian Jiu-Jitsu and is a gold-medal winner at the Canadian Fencing Championship team event. For *Covert Self-Defense*, he sought out some of the world’s leading martial artists and tactical experts to combine their field experience with his scientific mindset. The result is a modern exploration of awareness, restraint, and readiness. He lives in Montréal, Canada, with his wife Kirsty and his daughters, Catherine and Julianne.

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FIGURE 3.4



Here's a taste of what's inside—

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- ✔ **Live demonstrations of the 3 best combat grips when using the pen in self-defense**
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- ✔ **How to avoid legal trouble by using a “less-than-lethal” pen maneuver**
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