



*Get sample
checklists and
practical tips!*



Creating a Digital Assets Estate Plan

with Charlotte McCurdy

Thursday, October 3, 2024

Live webinar with chat

*includes 60 day replay**

9:00 am – 10:30 am (Pacific)

10:00 am – 11:30 am (Mountain)

11:00 am – 12:30 pm (Central)

12:00 pm – 1:30 pm (Eastern)

1:00 pm – 2:30 pm (Atlantic)

1:30 pm – 3:00 pm (Newfoundland)

**This program features real-time audio and video of the presenter with synchronized presentation slides, and a chat feature that allows for live Q & A. SK attendees please verify whether you align with Central (MB) or Mountain (AB) time based on season and location.*

WHO SHOULD ATTEND

This program is designed for lawyers who want to update their current estate and incapacity planning and estate administration practices to address digital assets.

ABOUT THE PROGRAM

We interact with digital assets hundreds of times a day - from the photos and videos stored on our smartphones and computers to our social media accounts and downloaded music. Some of these assets add significant financial value to our estate while others have purely sentimental value, but all can easily slip through the cracks. Do you have the knowledge to ensure your client's digital assets are managed in accordance with their wishes? This 90-minute webinar with experienced estates lawyer Charlotte McCurdy will explain the rules that govern this rapidly growing asset class, address how to gain control of them upon mental incapacity or after death, and show you how to create a digital assets estate plan, with administration in mind. You will learn:

- Which digital assets are often lost at death
- Impact of policy and law on digital asset planning
- Practical planning tips: what works, what doesn't, and what we still don't know

Digital assets are a big part of your clients' lives. Attend this program and learn what you can do to help their fiduciaries access and preserve those assets after your clients' loss of capacity or death.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

What are Digital Assets?

- Tangible digital assets
- Intangible digital assets

Costs/Risks of Failing to Plan – Tips & Traps

Fiduciary Access to Digital Assets

- Statutory rights of Executors/Trustees/Attorneys
- How user policies & privacy laws impact access

Planning for Digital Assets

- Talking to clients about digital assets
- Locating and inventorying digital assets
- Updating digital asset inventories
- Naming a digital asset Executor
- Incorporating digital assets into estate and incapacity planning documents
 - Digital asset clauses
 - Memoranda/Letters of Wishes
 - Secondary wills

Program Wrap-up and Evaluation

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PRAISE FROM PAST ATTENDEES

- “Very practical presentation that dealt with matters that arise constantly in my practice.”
- “Good practical info. I do a lot of this work and found it very useful.”
- “Excellent coverage of the topic. Right on point.”
- “Enjoyed the practical approach. One of the best CPD programs I have experienced.”
- “Great presenter. Knowledgeable but very down to earth. Answers questions we deal with every day.”
- “Excellent - like a conversation with a colleague. I do a lot of work in this field, and I learned several new things.”



ON: This program contains 1.5 Substantive hours.

SK: This program qualifies for 1.5 CPD hours under the Law Society of SK CPD Policy.

BC: This program has been approved for 1.5 CPD hours.

MEET YOUR PRESENTER



Charlotte McCurdy practises with Perley-Robertson, Hill & McDougall LLP in Ottawa. She joined the firm in 2021 after having been partner at Taylor McCaffrey LLP in Winnipeg for many years. Charlotte’s dual jurisdiction (Manitoba and Ontario)

practice focusses primarily on corporate and commercial law, estate and incapacity planning, estate administration and elder law. She is a member of the Law Society of Manitoba and the Law Society of Ontario. Charlotte has her TEP designation, is currently Co-Chair of the MBA Wills, Estates & Trusts Section, and on the Executive of the CBA National Wills, Estates & Trusts Section. Charlotte has written about digital asset planning and regularly speaks to audiences of lawyers and non-lawyers about estate-related topics.

Lawyers in other mandatory CPD jurisdictions may count their attendance towards their CPD requirement/plan.

Seminar Partners is an Accredited Provider of Professionalism Content by the Law Society of Ontario and a pre-approved CPD Provider of the Law Society of British Columbia.

✓ **Yes, I want to attend Creating a Digital Assets Estate Plan, with Charlotte McCurdy**
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* Materials will be distributed electronically in advance. Live webinars feature real-time audio and video of the presenter with synchronized presentation slides, and a chat feature that allows for live questions and verbal responses by the presenter. The recording of the webinar is available for 60 days.

REGISTRATION FEE:

On or before September 20, 2024: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!

After September 20, 2024: \$165.00 + \$21.45 (13%) HST* = \$186.45

*With ON HST. Please adjust tax for attendee’s province as follows: 5% in AB, BC, MB, NWT, NU, SK, YK. 13% in ON. 15% in NS, NB, PEI & NL.

Register online: <http://seminarpartners.ca/register-for-courses/>

Register by mail, fax or phone: Return this form with payment to Jennifer Snoyer, Finance and Communications Coordinator, Seminar Partners, 2300 Yonge Street, Suite 1600, Toronto, ON M4P 1E4 Tel. 1.866.606.4212 or 647.352.8633 Fax 416.549.1619. Email: jennifer@seminarpartners.ca. Registration fee is refundable less \$50 admin fee if written cancellation received 10 working days before the program. No refunds will be made after the cancellation date. Program content, speakers and location may change without notice. See our website for all policies. In the event of program cancellation, our liability is limited to refund of registration fees. GST/HST #848208492

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