SEMINAR PARTNERS 11 YEARS 2008 - 2019

Don't let your clients' digital assets get left behind!

Digital Assets: Estate Planning & Administration

with Daniel Nelson

Thursday, October 17, 2019
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 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 all lawyers who want to increase their knowledge of estate planning, and update their estate-planning techniques.

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, downloaded music, and loyalty points. 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 that your client's digital assets are managed in accordance with their wishes? This exciting new webinar with experienced estates lawyer Dan Nelson will explain the rules that govern this new and rapidly growing asset class, address how to gain control of them after death, and offer strategies to effectively incorporate digital assets into estate planning documents. You will learn:

- Which digital assets are often lost at death
- The 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 make sure they don't disappear, or time and money is not wasted tracking them down, after your clients' deaths.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction
What are digital assets?
- Physically controllable digital assets
- Controlled access digital assets

Costs/risks of failing to plan for digital assets
Fiduciary access to digital assets
- Statutory rights of Executors/Trustees
- How user policies impact access
- How 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 planning documents
    - Digital asset clauses
    - Memorandums
    - Secondary wills

Program Wrap-up and Evaluation

Get unlimited access to all our live webinars for the year with an All Access Pass for $599 + tax!

PRAISE FOR PAST ESTATES PROGRAMS

• *"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 ever experienced."*
• *"A dream presenter. Knowedgeable 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."*

CPD CREDIT

BC: *This program has been approved for 1.5 CPD hours.*
ON: *This program contains 1.5 Substantive hours.*
SK: *CPD application is pending.*
NB*: CPD application is pending.*
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.

MEET YOUR PRESENTER

Dan Nelson is a senior partner at Civis Law LLP in Toronto. An experienced estates lawyer, Dan is an expert at guiding clients at all stages of life through the process of preparing wills, powers of attorney, and trusts. He also offers practical business advice to both experienced and new entrepreneurs, particularly in the field of design. Dan is a frequent lecturer and writer, with appearances on CBC TV, CBC Radio, Global News, CTV and Canadian AM, and expert quotes in the *Washington Post*, *Canadian Business*, and the *Toronto Star*. An experienced adjudicator and mediator, he is also a member of the Conservation Review Board. In 2013, Dan was awarded the Widdifield Award from the Ontario Bar Association for his work on the intersection of estate planning, estate administration, and social media, known as digital legacy. He holds undergraduate and graduate degrees in Canadian Studies from Trent University, and a degree in law from the University of Windsor.

√ Yes, I want to attend Digital Assets: Estate Planning & Administration

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* Materials will be distributed electronically in advance. Live webinars feature real-time audio 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 19, 2019: $140.00 + $18.20 (13%) HST* = $158.20** ***- Save $25.00!***

□ After September 19, 2019: $165.00 + $21.45 (13%) HST* = $186.45

□ **$0 - I have a $599.00 Annual All Access Pass to 40+ programs. Enter Pass ID: ______________**

**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.*

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