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Digital Assets in Estate Planning & Administration

with Daniel Nelson

Thursday, February 16, 2023

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 lawyers who want to learn how to update their current estate planning and 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 that your client's digital assets are managed in accordance with their wishes? This 90-minute webinar with experienced estates lawyer Dan Nelson will explain the rules that govern this 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 that they don't disappear, or that 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

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."*

CPD CREDIT **ON:** *This program contains 1.5 Substantive hours.*
SK: *This program has been approved for 1.5 CPD hours.*
BC: *This program has been approved for 1.5 CPD hours.*
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 the Managing Partner at Massey 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, Global News, and CTV, and expert quotes in the *Washington Post*, *Canadian Business*, and the *Toronto Star*. An experienced adjudicator and mediator, he is also a part-time member of the Ontario Land Tribunal, where he specializes in the *Ontario Heritage Act*. Dan is a past recipient of the OBA's Widdifield Award 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 in 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 January 27, 2023: $140.00 + $18.20 (13%) HST* = $158.20** ***- Save $25.00!***

□ After January 27, 2023: $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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