



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

General Course Certificate of Completion

Attendee Name: _____

Program Title: Ten Ways to Protect Your Client's Digital Assets

Delivery Method: Webinar – Live Delivery

Instructor(s): Betsy L. Ehrenberg

Program Desc: Financial risks have arisen from the pervasive electronic fraud that is now extant in the virtual and digital age. One important issue to discuss with clients is Protecting Digital Assets. People worked hard to build their wealth. We show how technology can protect it.

Individuals have their name in over 200 locations in cyberspace at their end of life. Trust and estate planning and estate administration should include discussions about digital assets, electronic records, data and documents; all estate planning documents should include legal provisions to control access to and security of these valuable assets.

By the end of this advanced session attendees will be able to:

- Identify digital assets and custodian protocols that create postmortem roadblocks to access.
- Learn ways to assemble and organize keys to electronic records for data and document access and protection.
- Learn strategies to motivate clients to discuss and protect digital assets during trust and estate planning and review.

Betsy L. Ehrenberg is CEO and founder of Legacy Concierge, a fin-tech firm delivering digital asset resolution services. Betsy advises clients on a broad range of security protection options for their portfolio of digital and tangible assets. She specializes in digital asset LOCKYT account notification protocols with custodians, especially those custodians who are reluctant to release control to the fiduciary.

Betsy was the first female manager with IBM Canada and authored several proprietary technology training programs for them. Recently she presented to attorneys and financial planners at the International Digital Assets Seminar in Nigeria, and before COVID, to the STEP Digital Assets Conference in London. She has been recognized as an Outstanding Business Executive in Silicon Valley and was recognized as a C-Suite executive in New Mexico, where she currently resides.

Sponsor: National Association of Estate Planners & Councils

Program Date: Live Program Held April 20, 2022

Date Viewed: _____

Location: Webinar Delivery

Instruction Minutes: 60

Eleanor M. Spuhler, Administrator

The Association of Choice for Estate Planning Professionals