

Protecting Digital Property

TEASER DECK



Legacy Concierge

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Empower Your Digital After Life

Digital Property is Everywhere

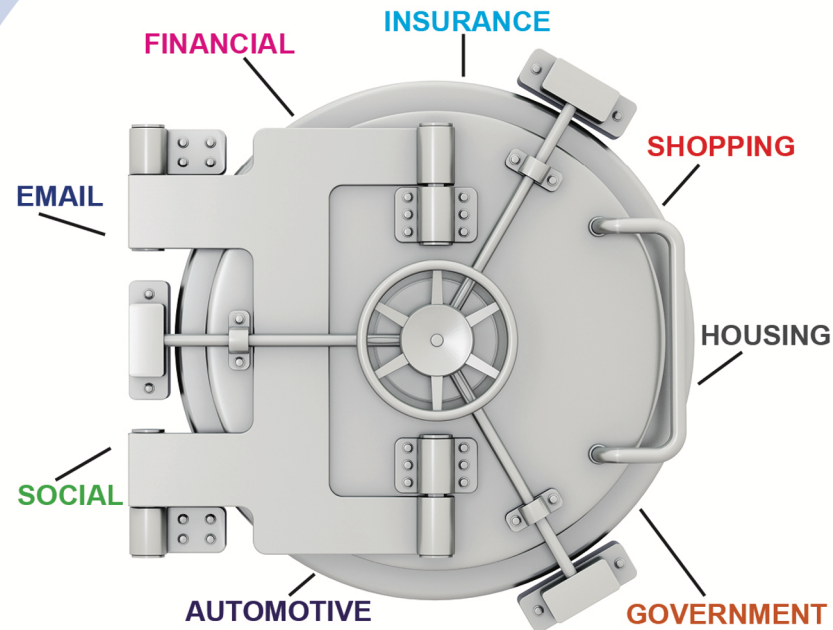
Most people under 75
have more than 160
different digital
accounts.



What Happens to Digital Assets After Life?

Emails, Videos, Photos

Username, permissions
Bill pay, ACH transactions
Paperless financial records
Housing costs, assistants
Shared financial records
Insurance policies
Credit monitoring services
Apps and cell phones
Businesses, partnerships
Manuscripts, research data
Art collections



Assets are lost, Assets
are stolen, Asset value
decreases.



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Use Digital Inventory to Secure Estate

When the Time Comes...

- Financial - banks, brokerage, investments, retirement and trust accounts
- Insurance - life, property, auto, pre-need, long-term care / disability (multiple carriers)
- Loan documents, private investments, real estate, promissory notes
- Patents, trademarks, web domains, usernames
- Retirement, annuities, pensions (previous employer)
- Scheduled deposits and payments
- Social media and search results....and more

It should not be this difficult but it is because custodian rules change.

**Secure accounts
with forensic
precision and
innovative
technology.**



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Handling Your Email, Videos, Photos

- Emails [Personal Gmail, Business Mail, Contacts, Tweets]
 - Google court order from probate state
 - Contacts for notifications
- Videos [Phone, Tablet, Lap Top, Desk Top]
 - Apple court order from probate state
 - iCloud contents, backup utilities
- Photos [Facebook, Google, Instagram, iCloud]
 - Memorialize with Facebook and Instagram
 - Inactive User with Google
 - Digital Legacy with Apple and iCloud (4Q21)



Wealth is in jeopardy if professional teams do not know where asset data and documents reside.
Who will spend over 120 hours for about a year securing trust and estate accounts?

People to Contact and Documents to File

- Organize names and contact information for **family** members.
 - Identify which family members could help with administration.
 - Confirm that each family member would help when asked.
- Organize names and contact information for **advisors**.
 - Wealth Managers, trust officers, attorneys, financial planners.
 - Insurance carriers, policy documents and summary pages.
- Organize wills, trusts, powers and **legal documents**.
 - Identify health professional that you trust with you life.
 - Confirm that people and wishes align with current preferences.

If your executor cannot access digital assets, who will?
When and how will a **executor gain access** upon death or disability?

Eight Reasons To Secure Digital Assets

1. User names and web domains generate income.
2. Photos, videos and emails have sentimental value.
3. Private business partnerships and retirement accounts are stolen.
4. Abandoned assets and bank accounts remain unclaimed.
5. Digital wallets control millions that are lost.
6. Fraudsters impersonate decedents and steal assets.
7. Fraudsters discover your intentionally hidden assets.
8. Digital assets are easily and illegally transferred to new owners.

Guide your family
to create plan for a
meaningful
Digital After Life
as a gift to the next
generation.

Patience During Probate

- Family and professional contacts are needed for notification.
- Estate planning documents (wills, trusts) must be reviewed.
- Identity theft protection subscriptions **will expire**.
- Wealth preservation and wealth transfers take time.
- Data and documents reside in both digital and tangible formats.
- Online notification processes (Google, Facebook, Apple) take ... forever.

Make your plan for executors to locate, control, curate and collect your **Digital After Life.**

Digital Property – Digital Assets

Revised Fiduciary Access to Digital Assets Act (RUFADAA)

- Electronic records in which an individual has a right or interest.
- Emails, text messages, documents, manuscripts, photos, spreadsheets, tax records, returns, PowerPoint presentations, e-books and more.
- Located on personal computers, laptops, MP3 players, tablets, flash drives, smart phones, CDs and DVDs, cloud storage and more.
- Legislation provides a process by which a personal representative or other fiduciary may request and the digital asset custodian can disclose digital asset information. This means banks, brokers, financial advisors and accountants can no longer deny requests for digital assets.



Questions and Answers



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