

Digital Assets in Estate Planning

Course Description

It is important that access to online bank accounts, Instagram pictures, eBooks or even reward miles be considered as part of the estate planning process in today's digital world. This course discusses, in detail, why digital assets should be included in the estate planning process. It then walks you through the steps you need to consider when planning for digital assets and overviews some factors that should be considered during this process. Finally, it discusses some of the difficulties and solutions of managing digital assets due to corporate and state restrictions.

Completion Deadline & Exam: This course, including the examination, must be completed within one year of the date of purchase. In addition, unless otherwise indicated, no correct or incorrect feedback for any exam question will be provided.

Course Level: Overview. This program is appropriate for professionals at all organizational levels.

CPE Credits: 1 (CPA)

Category: Finance

Prerequisite: None

Advanced Preparation: None

Course Learning Objectives

After studying this course you will be able to:

1. Recognize the difficulty in accessing digital assets of a deceased person.
2. Identify digital assets.
3. Identify critical components of digital asset planning
4. Recognize the difference between owned and leased digital assets.
5. Recognize the approaches corporations and states are taking with accessing digital assets of deceased individuals.