ADVISOR WEBINAR

DIGITAL ESTATE PLANNING: AFTERLIFE IN THE CLOUD

Meet Jamie Hopkins, Retirement Risk and Income Expert
Esq., LLM, CFP®, ChFC®, CLU®, RICP®

About the Speaker:

Your presenter for this live professional webinar is **Jamie Hopkins, Esq., LLM, CFP®, ChFC®, RICP®,** the CWO for Bryn Mawr Trust and CEO of Bryn Mawr Capital Management. He is also the Founder and President of FinServ Foundation, a 501(c)(3) dedicated to enhancing the financial services nextgen. Jamie is also a former Finance Professor of Practice at the Heider College of Business at Creighton University, and a former Professor of Taxation at The American College, where he helped co-create the Retirement Income Certified Professional® (RICP®) education program.

In “Digital Estate Planning” by Jamie Hopkins, you will:

- Understand a workable process for planning for a client’s end of life
- Review the necessary documents for end of life planning
- Develop an understanding of the challenges to digital assets
- Review the best practices for digital asset planning under RUFADAA

We live in a digital world. Our entire life is becoming stored online in the cloud, but very few people understand or plan for what this means from an asset transfer, management, and ownership standpoint. What happens to your emails, passwords, photos, and websites when you pass away? Honestly, it really depends on your level of planning. Most states now require you to do affirmative planning in order to pass on these assets to your heirs or to allow others to access the information. Failure to do such planning could leave your assets tied up forever in the cloud, unavailable to business partners or loved ones, causing tremendous hardship and financial damages. So learn the rules around digital asset ownership, transfer, and how to set up a digital asset estate under the new law RUFADAA.

Date: Wednesday, Oct 15th, 2025
Time: 11:00 am - 12:00 pm PDT
2:00 pm - 3:00 pm EDT

Click the button or scan the QR code to register

Register

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