



# Getting Your Affairs in Order

Contact Betsy for your free Legacy-Vault so that you can get started.

Betsy L. Ehrenberg  
[betsy@legacy-concierge.com](mailto:betsy@legacy-concierge.com)  
(650) 380-0688

# Technology Support



Trust and Estate Plans  
Must Address Both  
Digital and Tangible  
Assets

Digital Assets are electronic records that point to something of value or in of t themselves are valuable.

Wealth money and memories.

# Digital Property is Everywhere

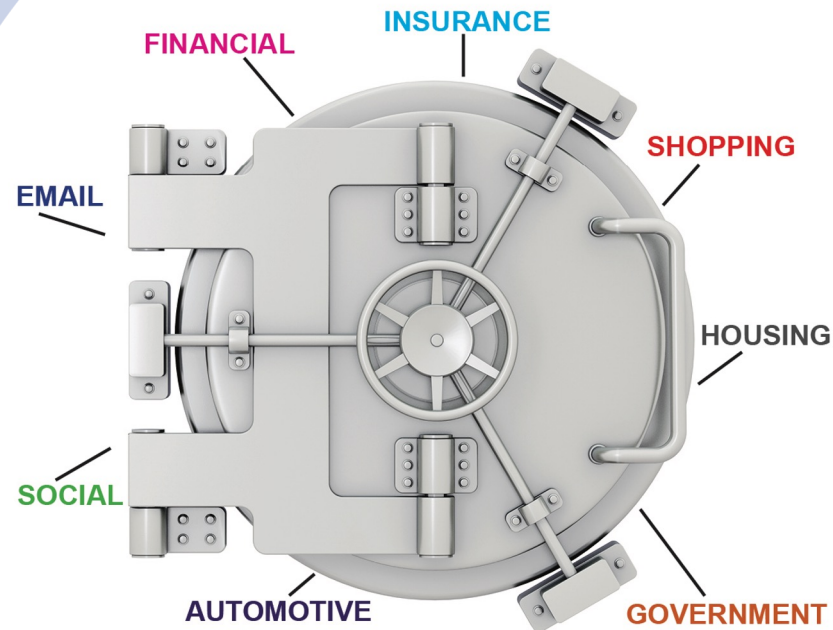
Most people under 75  
have more than 200  
different digital  
accounts.



# What Happens to Digital Assets After Life?

## Emails, Videos, Photos

Username, permissions  
Bill pay, direct deposits  
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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# 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.



# Everyone Wins with a Digital Asset Inventory

- **Attorneys** incorporate digital and tangible fiduciary roles in their trust and estate documents,
- **Wealth Managers** consider virtual businesses, international accounts and cryptocurrency,
- **Insurance** agents ensure that coverage contracts are proper and balanced for digital assets,
- **Clients and their families** understand the value of their contact lists, social media, patents, web domains and other digital assets.

Ease the transition by protecting your assets and identity, find hidden wealth and close down necessary accounts, both financial and social.



# Technology Protects 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



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?

# Email Privacy Considerations

- Personal email and business email accounts.
- Attachments may include:
  - Private implications
  - Images and videos
  - Financial instruments
- Content may have been extracted:
  - Search results
  - Profile vendors
  - Images management
- California, Virginia, North Dakota residents have privacy options.
- Reputation correction sites and online delete options.

Who are the administrators of your multiple email accounts and your social presence?





# Photo and Video Privacy Considerations

- Multiple locations exist and more will develop.  
Email accounts  
Google images  
YouTube/TikTok recordings
- Conference attendance waivers  
Did you agree?  
Were you given the option?  
What are your rights?
- Private events  
Family gatherings  
Business meetings  
Social presence (FLAG)

## FLAG Settings

Facebook  
LinkedIn  
Apple  
Google



# Technology to Support Your Wishes

- Digital Vaults hold data and documents
- Credit Reports contain financial obligations.
- Tax Returns can be read electronically.
- Missing Money points to escheated dollars.
- US Treasury holds dollars from uncashed checks.
- Previous addresses and employers hold value.
- Death certificates and wills can be electronic.
- Password managers encourage impersonation.
- Fiduciary responsibilities should be delegated.
- Online notification processes (Google, Facebook, Apple) take ... forever.

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





# Getting Your Affairs in Order Includes

Building **Legacy Vault**  
for Asset Organization  
and Locating Assets  
with **LOCKYT Discovery**



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