Pro-Seminars

SSC # 156 – INSURANCE ADVISOR'S GUIDE TO DIGITAL ESTATE PLANNING

This course is eligible for:

3.5 Life & A&S CE Credits for BC, SK, MB & ON.

3.5 Life ONLY CE Credits for AB.

Target Audience

This course is designed for:

- Life-licensed insurance advisors
- Financial advisors and planners
- Estate planning specialists
- Segregated fund advisors
- Retirement income planners
- Advisors serving aging clients and vulnerable clients
- Advisors working with business owners
- Advisors supporting executors and families during estate administration

Course Purpose

The purpose of this course is to equip advisors with:

1. **A complete understanding of digital assets** and how they affect estate, retirement, and insurance planning.
2. **A practical framework** for helping clients organize, protect, and transfer digital information.
3. **Compliance-aligned processes** for discussing digital access, executor readiness, and vulnerable client considerations.
4. **Advisor-ready tools** for identifying digital estate risks and recommending appropriate insurance and planning solutions.
5. **Cross-Canada case studies** that illustrate real-world digital estate failures — and how advisors can prevent them.

The course is designed to elevate advisor professionalism, reduce estate failures, and protect families from the growing risks of digital incapacity and digital estate collapse.

Learning Objectives

By the end of this course, advisors will be able to:

1. Identify and categorize all major types of digital assets
2. Explain the legal, financial, and administrative challenges digital assets create
3. Build a complete Digital Estate Planning Framework
4. Integrate insurance solutions into digital estate planning
5. Apply compliance-aligned practices
6. Support executors and families during digital estate administration
7. Apply cross-Canada case studies to real client situations