

21st Century Fiduciary Certificate of Completion

Register Now: **PROMO CODE-NASBA100d1**
Normal cost is \$500, but there is a 50% discount for
those who register early as first 10,000!

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Earn 4 CPE Credits

Behavioral Ethics

Online Self-study

Program Level: Basic

Advanced Preparation: None

Prerequisite Knowledge: None

**Receive 21st Century Fiduciary
Certificate of Completion**

Program Description: 21st Century Fiduciary is designed to educate those serving as fiduciaries on fiduciary obligation in a digital world (including recent fiduciary access law in estate planning), on technological competence to keep nonpublic information secure online, as well as to recap standards of conduct for broker-dealers and investment advisers.

Upon completion of this Curriculum, the participant will be able to:

- Identify the legal obstacles fiduciaries face meeting their obligations to protect and manage digital assets because of federal privacy laws and terms of service agreements between an account holder and an internet service or electronic storage provider and what actions can be taken by users to proactively manage digital assets.
- Recognize digital assets as defined by state probate law as well as their value to individuals and to online service providers. Differentiate between content-based electronic communications and all other digital assets of a user of electronic communications services and recognize the importance to a fiduciary. Demonstrate awareness as to the value of digital assets in order to best assist clients make decisions for their disclosure.
- Identify the legal procedures a fiduciary is obliged to know for accessing the digital assets of his or her principal, an estate, a beneficiary of a trust, or a protected person under state probate law.
- Recognize the fiduciary obligation of technological competency to keep non-public information secure.
- Recognize professional responsibility owed to main street investors.

Refund/Cancellation Policy: At this time, unfortunately, there are no refunds for any program. Exceptions may apply only in the event of a technical complication caused by DAI™. You may contact DAI™ at digitalassetinitiative@protonmail.com or through our Contact Us page with any questions regarding the Refund/Cancellation Policy. Please reference "Refund/Cancellation" in email subject. If any program is cancelled by DAI™, a registrant shall be notified by email prior to the program's expiration date which will be shown in the program's description and be given the opportunity to either transfer to another program or obtain a full refund. If no fee is charged for a course, then it will be mentioned as "No Fee" on the promotional material or on the website.



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