

Become a Digital Estate Plan Consultant



You and your clients need a Digital Estate Plan

Your clients have digital “stuff” – we all do. Social media accounts, financial accounts online and in the cloud, website and blog content, personal digital assets like photos and videos, genealogy research, seller’s accounts, passwords – just to name a few.

How do you organize it all? You and your clients need a Digital Estate Plan that:

- Centralizes digital information in one place
- Provides for the safe transfer of passwords, user codes, and other login information to an Executor or other authorized representative
- Creates a paper trail for online or web-based accounts that have no tangible statements
- Accounts for digital assets that might be overlooked by your Estate
- Protects your clients from unauthorized access by identify thieves or other digital mischief-makers

Why should I become a Digital Estate Plan Consultant?

There are many benefits to your career as a professional organizer or a productivity specialist to becoming a Digital Estate Plan Consultant.

You will:

- Create an additional revenue stream.
- Provide a critical, cutting-edge organizing service to your clients.
- Add more value to the services you currently offer.
- Discover a simple, low-tech way to enter the lucrative arena of digital information.
- Enhance your credibility.
- Give your clients peace of mind.
- Enhance partnering opportunities with other professionals like financial planners, estate planners, etc.

You are not conveying legal, financial, or estate advice of any kind. You can be a Digital Estate Plan Consultant without a lot of expensive training, education, certification or risk.

Who needs a Digital Estate Plan Consultant?

Many of your clients can benefit from a Digital Estate Plan including:

- Digital natives and millennials with assets, accounts, and information stored on the web.
- Prudent baby boomers who understand the Digital Age poses special challenges for keeping track of information.
- Members of the financial and legal community responsible for the estate planning of others.
- YOU!

How do I become a Digital Estate Plan Consultant?

It's easy.

- Sign a Letter of Agreement which you are free to preview in advance.
- Pay FileHeads a licensing fee of \$250.00 (renewable annually at your option)
- Schedule a session with me to **create your own personal Digital Estate Plan**. That way you have actual experience creating a Plan, and the bonus of having your own plan.
- Set up 2 brief, private sessions in which I will teach you solutions to possible questions and scenarios that may arise when creating a Digital Estate Plan for your clients. We can do these session in-person, via Skype, or on the phone.

What is included in the Digital Estate Plan package?

We provide everything you need to be successful including a customizable Digital Estate Plan form that you can use over and over again with each client. You can even add your own logo to the Digital Estate Plan form. The package also includes:

- A Preparation List
- A Letter of Agreement Sample to use with clients
- A Confidentiality Statement
- Pricing Information
- A no cost session to develop your own Digital Estate Plan
- Two sessions to answer questions, troubleshoot and anticipate common problems
- Promotional descriptions and illustrations to post on your website

How much money can I make creating Digital Estate Plans for my clients?

You are free to charge whatever you want for developing a Digital Estate Plan for your clients. I will even share my pricing information. FileHeads makes nothing off your Digital Estate Plan service to your clients: no fees, royalties, commissions, percentages, or compensation of any kind. You keep it all except the annual licensing fee.

Why not contact us today and look over the Letter of Agreement.

Call us at 404-231-6172

or email us at info@fileheads.net

for this free, no-obligation information.

