



SSC # 166 – THE NEW FRONTIER OF EXECUTOR RISK: DIGITAL ASSETS, AI GENERATED WILLS & INSURANCE SOLUTIONS

This course is eligible for:

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

Target Audience

This course is designed for:

- Licensed Canadian financial advisors (Life/A&S)
- Planners working in insurance, retirement, and estate planning
- Advisors supporting aging clients, executors, and families in transition
- Professionals seeking CE credits across all provinces and territories
- Advisors who want to understand digital estate risk, AI-generated wills, and the insurance strategies that mitigate executor liability

Purpose of This Course

The purpose of this course is to equip Canadian financial advisors with:

- A deep understanding of **executor risk in the digital era**
- The ability to identify **digital estate vulnerabilities**
- Knowledge of **AI-generated wills**, their risks, and their legal standing
- Strategies to help clients organize, protect, and transfer digital assets
- Insurance-based solutions that reduce executor liability and estate conflict
- A cross-Canada understanding of probate, digital asset laws, and estate administration
- Practical tools, checklists, and advisor scripts
- Compliance and due-diligence expectations for advisors

Learning Objectives

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

1. Explain the new categories of digital assets and how they impact estate administration.
2. Identify the risks associated with AI-generated wills and automated estate tools.
3. Understand executor liability in the context of digital estates and cross-border digital residency.
4. Recommend insurance strategies that reduce executor burden and estate conflict.
5. Guide clients in documenting, organizing, and protecting digital assets.

6. Recognize provincial differences in probate, digital asset legislation, and estate administration.
7. Apply compliance-aligned practices when advising on digital estate planning.
8. Use case studies to illustrate best practices and avoid common pitfalls.