

## Digital Executor®: Unraveling the New Path for Estate Planning

**Sharon Hartung**

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*Digital Executor is a helpful business development book with specific advice for managing a person's online world after they die.*

Sharon Hartung's *Digital Executor* is a timely and fascinating guide to managing the digital affairs of one's clients.

With the understanding that contemporary trustees must consider their clients' digital assets, in addition to their physical assets, as a necessary part of estate planning and service, this book argues that the internet, and its interconnected world of digital applications, email, and online shopping, forever altered the landscape of wills and estates. It also asserts that legal rules have not kept up with these new realities. With that in mind, it forwards advice for handling such disconnects.

Hartung understands that tasks as simple as accessing a person's email after they die carry legal risks: most email user agreements do not allow for such sharing of materials. Still, general reliance on password sharing leads to what she calls one of the three big myths of estate planning: that "password managers and hard copy lists are the answer." Insightful advice for grappling with the particulars of such challenges abounds.

Considering the rise of digital culture and the practicalities of digital assets in turn, the book's early chapters explain why digital planning matters. Next, the book explores project management techniques to help fiduciaries with their processes, including wills and estate planning, as well as estate administration. Its final chapters forward specifics on dealing with digital assets; they include a series of helpful questions to help with related planning.

The book's matter-of-fact style makes complicated topics, like the challenges of access, accessible. Hartung's tone is credible, and she references outside work ably, noting articles from the industry-specific Society for Trust and Estate Practitioners in a clear manner. The lessons are illuminated by occasional examples, as of a Canadian client who sought access to email, but was foiled by the company being based in the United States. The book's prompts for clients about how to tackle various assets are repetitive, though, as is its general advice for each asset type; it advises practitioners on repeat to have conversations with their clients, and to be proactive about dealing with digital assets.

The book works toward an optimistic conclusion, suggesting that the IT world and governments could soon become better at addressing issues relating to digital assets; it looks forward to better laws and practices. Overall, its thoughtful exploration of the technological and legal complexities at play after death makes it a good companion for practitioners who are struggling to help their clients navigate contemporary challenges.

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JEREMIAH ROOD (June 16, 2021)

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