DELAWARE STATE BAR ASSOCIATION
CONTINUING LEGAL EDUCATION

THE GREAT WAKE-UP CALL
ESTATE PLANNING IN THE DIGITAL AGE

DSBA SEMINAR VIA ZOOM

SPONSORED BY THE THE ESTATE REGISTRY

THURSDAY, FEBRUARY 23, 2023 | 12:00 P.M. – 1:00 P.M.

1.0 Hour CLE credit in Enhanced Ethics for Delaware and Pennsylvania Attorneys

ABOUT THE PROGRAM

In this program, we will introduce estate planners to ideas and innovation that deepen client relationships, augment client service, and generate recurring revenue models into T&E practices without taking away from billable time. We'll highlight the changing perceptions of sustainable inter-generational estate planning and the opportunities within.

Key topics will include:

- How the digital economy has made us rethink digital life after death
- The inheritance economy – greatest wealth transfer in history
- The changing face of estate planning
- Driving transparency in life and legacy planning for the "Circle of Trust"
- Planning across generations

SPEAKERS

Alyssa Rakovich, Pension Plan Consultant, Accredited Investment Fiduciary, and Director of Strategic Partnerships – Wealth Management at The Estate Registry. Alyssa has a deep background in financial services exceeding twenty years working with high-net-worth families and business owners worldwide and supervising advisors and staff involving over $15 billion in client assets. Having spent 17 years at Smith Barney turned Morgan Stanley at wire house firms in both production and management, Alyssa maintains her registrations with NAMCOA®, (Naples Asset Management Co, LLC®) and maintains the AIF® (Accredited Investment Fiduciary®) and PPC® (Pension Plan Consultant) designations.

Ravi Rao, SAP-certified Innovation and Knowledge Advisor, and Director of Strategic Partnerships – Legal Services at The Estate Registry. Ravi has worked for over 20 years at technology firms, ranging from global enterprise business systems to practice-specific toolsets. His expertise includes solution strategy and delivery of technology to more than 10,000 attorneys for the purposes of driving business models, efficiencies and improving client service, bringing enterprise-grade practice management solutions to the AMLAW200 for the purposes of digital transformation and modernization of the legal IT landscape.

Visit https://www.dsba.org/event/the-great-wake-up-call-estate-planning-in-the-digital-age/ for all the DSBA CLE seminar policies.

Speakers

Alyssa Rakovich

Pension Plan Consultant, Accredited Investment Fiduciary, and Director of Strategic Partnerships – Wealth Management at The Estate Registry

Ravi Rao

SAP-certified Innovation and Knowledge Advisor, and Director of Strategic Partnerships – Legal Services at The Estate Registry

Alyssa Rakovich

Alyssa Rakovich, Pension Plan Consultant, Accredited Investment Fiduciary, and Director of Strategic Partnerships – Wealth Management at The Estate Registry. Alyssa has a deep background in financial services exceeding twenty years working with high-net-worth families and business owners worldwide and supervising advisors and staff involving over $15 billion in client assets. Having spent 17 years at Smith Barney turned Morgan Stanley at wire house firms in both production and management, Alyssa maintains her registrations with NAMCOA®, (Naples Asset Management Co, LLC®) and maintains the AIF® (Accredited Investment Fiduciary®) and PPC® (Pension Plan Consultant) designations.

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