



# National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

## General Course Certificate of Completion

Attendee Name: \_\_\_\_\_

Program Title: What Estate Planning Professionals Need to Know About Cybersecurity in the Era of COVID-19

Delivery Method: Webinar – Live Delivery

Instructor(s): Justin Joy, JD, CIPP/US, CIPT

Program Desc: Clients regularly trust planning professionals with something nearly as valuable as their money — their personal information. Cyber criminals are well aware that financial planners, trust officers, CPAs and attorneys are treasure troves of information that can be exploited to perpetrate a variety of schemes and frauds. Concerned with this growing problem, clients are increasingly expecting that planning professionals will keep their information private as well as secure. Additionally, those professionals with access to client assets may be targets of cyber-attacks to steal those funds. The challenge of keeping client information and assets secure has increased in recent months, as work environments have changed dramatically and rapidly due to the COVID-19 pandemic, and sadly, many cyber criminals are exploiting the impacts of the health crisis for their own financial gain.

This presentation will discuss the various cyber threats confronting estate planning professionals, legal obligations and risks in the context of data security, and some non-technical strategies for reducing this legal risk with specific considerations related to impacts from COVID-19.

Justin Joy is a shareholder in the Memphis office of the Lewis, Thomason, King, Krieg & Waldrop, P.C law firm. He also serves as the firm’s privacy officer. In addition to a range of experience in healthcare liability defense litigation and business law matters, Justin heads up Lewis Thomason’s cybersecurity practice group. He provides counsel to clients in a variety of industries in the area of information privacy and data security including incident investigation and breach response management, regulatory compliance, privacy and security policy review and drafting, and cyber risk management. Justin speaks frequently to various groups and organizations on the topic of information privacy and cybersecurity.

Justin is a Certified Information Privacy Professional/US (CIPP/US) and a Certified Information Privacy Technologist (CIPT) through the International Association of Privacy Professionals. He is a 2001 graduate of Wake Forest University and holds a law and MBA degree from the University of Memphis.

Sponsor: National Association of Estate Planners & Councils

Program Date: Live Program Held July 8, 2020

Date Viewed: \_\_\_\_\_

Location: Webinar Delivery

Instruction Minutes: 60

Eleanor M. Spuhler, Administrator  
Authorized Provider Official

*The Association of Choice for Estate Planning Professionals*