

Speaker Bio:

Morgen Rochard, CFA, RLP®, is the founder of Origin Wealth Advisers LLC, a fee-only registered investment advisory firm celebrating its 10th anniversary this summer. In addition to her role at Origin Wealth Advisers, she serves as a bitcoin financial consultant at Money Owners LLC. Morgen is the author of the "Personal Financial Quickstart Guide" and co-hosts the "Bitcoin for Advisors" podcast. She is currently working on a book centered on Bitcoin and personal finance.

Presentation Outline:

Bitcoin Estate and Tax Planning

- Reasons to hold Bitcoin for investors
- Differences between Bitcoins v. Altcoins
- Brief discussion regarding how blockchain technology works
- How blockchain is owned and how you can ensure that successors can access it in event of your death or incapacity
- 2025 tax regulations changes for blockchain currencies