FOR CRYPTO CPAS & TAX ADVISORS

MY-LEGACY.AI // SHIELDED BY LOKBLOK

My-Legacy.ai

You Optimize Their Tax Strategy. We Ensure Their Family Can Actually Inherit It.

A step-up in basis only matters if the asset is still reachable. My-Legacy makes sure it is.

AFFILIATE REVENUE.
ZERO ADDED LIABILITY.
AUDIT-READY DOCUMENTATION.

SHIELDED BY lokblok®

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https://My-Legacy.ai

THE PROBLEM

A TAX STRATEGY IS ONLY AS GOOD AS **THE ASSET YOU CAN STILL REACH.**

As a tax advisor to clients with self-custodied digital assets, you see exactly where the exposure lies — capital gains, harvesting, step-up in basis. But if a client dies and their private key or password manager master credential is lost, the strategy fails: the asset is permanently inaccessible, no matter how well the tax plan was built.

Lost Step-Up in Basis

Inherited cryptocurrency is property under IRS Notice 2014-21, eligible for a step-up in basis at death. If the family can't access the self-custody wallet, the asset — and the tax benefit — evaporates.

Estate Tax Reporting

A Form 706 can't be accurately completed or an estate closed if a material portion of the client's wealth is locked in an inaccessible wallet.

The 1099-DA Environment

As digital asset reporting tightens, clients are already coming to you for structural guidance on their crypto holdings — succession is a natural extension of that conversation.

HOW MY-LEGACY SUPPORTS YOUR PRACTICE

A Natural Extension of the Work You Already Bill For - and a New Revenue Line

Protect Estate Value
A standard-of-care recommendation that ensures self-custodied assets actually transfer to beneficiaries.

Audit-Grade Documentation
Every transfer event produces a timestamped, cryptographically signed record — the basis and reporting documentation your firm needs.

Beyond Crypto
Extend the same continuity to business-owner clients dependent on password-managed operational infrastructure.

WHAT YOU'RE ACTUALLY REFERRING CLIENTS TO

One Platform. **A Complete Digital Estate**

My-Legacy is a 360° life-planning and digital-inheritance platform. Clients organize everything they need — assets, secrets, documents, wishes — and define exactly who gets access, when, under governed conditions.

HOW YOU PARTNER WITH US

You Remain the Trusted Tax Advisor. We Provide the Execution Infrastructure.

This is a referral relationship — no portal to run, no technology to maintain.

⚠ **Worth knowing**:
A referral fee arrangement is subject to AICPA Code of Professional Conduct Rule 1.520: it requires disclosure to the client, and is not permitted for any client to whom your firm provides attest services. State board rules may impose additional restrictions beyond the AICPA Code. We'd recommend confirming firm-wide policy on disclosure and applicability before rolling this out across your practice.

1. You identify the exposure Clients with significant self-custody holdings or digital-dependent business infrastructure, surfaced naturally during tax planning or 1099-DA review.

2. You refer Introduce My-Legacy as a best-practice succession layer for the assets you already know about.

3. The client enrolls directly Your firm can receive an affiliate revenue share, while the estate stays reportable and intact for the work you do next.

A Two-Way Referral Relationship

The relationship can run in both directions. You refer clients with self-custody or digital-asset exposure to us for the technical layer. In turn, when our own platform identifies users who need tax preparation, planning, or advisory support, we can route them to a small, curated panel of CPA and tax advisory firms — with the client's asset and transaction history already organized before they reach your desk.

The same AICPA Rule 1.520 disclosure requirement and attest-client exclusion noted above applies to referral fees received in either direction — this is a structural question for your firm's compliance function, not a one-time disclosure to check off.

Ideal Client Profile

- HNW or UHNW clients with known self-custody crypto holdings
- Founders and business owners dependent on password-managed infrastructure
- Clients already asking about crypto or digital succession in planning meetings
- Complex or blended-family estates where digital assets add another point of failure

Let's talk. We'd welcome a conversation about affiliate terms and how this fits into your annual tax planning cycle. No commitment required to start.

Book time directly: https://calendly.com/sree-chintala

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