

October 2010

Dear Clients and Friends:

Do you receive your monthly account statements by email? Of course, this only works if you *have* email, and not everyone does. But if you do, are you taking advantage of the option to go paperless?

Virtually all of the institutions you do business with, including banks, credit unions, mutual funds and brokerage firms, are happy to stop sending you paper statements in the mail. It saves them money. That's why when you log on to their website to check on your account, you'll see an offer somewhere to "go paperless."

I'd like a nickel for every time someone has asked me, "How long do I have to keep this statement?" You'll never have to wonder again. And you won't end up with boxes full of statements from banks that don't even exist anymore, for your Executor to puzzle over.

We're helping our clients who do have email to receive all of their statements by electronic delivery. It's green, it's keen, and you can print your annual statements for a paper file if you feel more comfortable that way.

With online management of accounts, you stay organized and nothing gets misplaced. You can see any of your statements with a few quick clicks. Advanced encryption technology keeps the bad guys out, giving you a secure method of centralized record keeping.

My assistant, Tara Taitague, will help any of my clients set up paperless delivery of their statements. You can reach Tara at 951-506-2338 or toll-free at 800-616-2338.

Regards,



Charles M. Shackelford