



Law Offices of Walter L. Sheffield III, PLLC

New Ways To Keep Up

By Walter L. Sheffield III

Electronic Connections

Who We Are:

Boutique law firm

Focusing on

Asset protection

Estate preservation

Walt Sheffield



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Last fall, when Congress was deliberating on the Estate and Gift Tax changes that it ultimately made in December 2010, I published several newsletters to keep you informed about the status of the deliberations and ultimately to summarize the changes. I prefaced these newsletters with a comment that I would not inundate my clients with needless newsletters. Since December, I have kept to that philosophy and published no newsletters. The world being as it is, however, I have moved increasingly to electronic devices and methods for communicating. I am sending you this mail so that you will know about these, in case you might find them helpful.

Secure File Sharing

I used to send drafts of documents to each client by mail. Increasingly, clients have been asking me to send them electronically. Email, though, is not secure and often requires several emails because of size restrictions on attachments. The solution to this is the addition of a secure electronic lockbox to which I can upload documents to be retrieved by clients and to which clients also may upload information such as financial statements, comments and changes to drafts, etc. Contact me if you need access to this, or I will remind you about it when we work on our next project for you.

Walt's Blogs

I have become a late convert to the idea of "blogging." Earlier this year, I began posting short blogs to my website. This way I can share ideas and developments that don't justify a mailing to all clients. I have found that I can do this quickly and efficiently, and clients can be selective in what they receive from me. For those who are interested, these blogs may be subscribed to using an rss feed button on the blog page of the website.

LinkedIn and Twitter

I have participated in www.linkedin.com for several years, but mostly I watched as people I know added more and more "connections." I wondered what they ever did with these "connections." I concluded that LinkedIn is of little value unless it is used to share information with one's connections. Earlier this year, I started sharing information, mostly in the form of notices that I had just posted a new blog on a certain subject to my website. If you're interested, please connect with me on LinkedIn. You may also follow me on Twitter. I promise I won't tell you where I ate lunch or what I ordered.

Group Presentations

Enclosed is a flyer on a June 28 program I am part of in Cary. I am speaking on financial and estate planning. I have been using my blogs, linkedin and twitter to announce talks I give so that, again, I do not inundate you with mail. Come to this, if you're interested.



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