

Cloud Tools and Efficiencies to Manage Your Practice



Abid Hussain

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CHARLES VANN
CONSULTING

Charles Vann

Chuck@CharlesVannConsulting.com

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(251) 404-3029

Roadmap

- About Abid Hussain
- About Charles Vann
- Profitability and Factors that Influence it
- Law Practice as an Efficient Business
- How the Cloud Puts Money In Your Pocket
- Cloud-Based Ecosystem
- Essential Online Apps
- Efficient Trust Accounting



About Abid Hussain

- Mobile, paperless law practice; clients in Dallas and New Orleans;
- I am the marketing, IT, accounting, and legal departments;
- Lawyer for almost 11 years, tech geek for 25 years;
- I have worked in large tech companies, tech startups, giant firms, small firm, and now I am a solo.

About Charles Vann

- 35 years as a COO and Executive Director in law firms
- Firms range from 20 to 375 attorneys
- Focused on teaching lawyers how to run their practice as a business
- Consultant to law firms of all sizes employing efficiencies into their business and tweaking their models for profitability,
<http://charlesvannconsulting.com>

Today's Goals

- Be nimble, responsive, and profitable, and do it securely.
- Treat your law practice as an efficient business.
- Learn to use Web Applications that make you highly profitable by saving time and eliminating redundancies.



Typical law firm owners view themselves as **professionals first, business people second**

The practice of law is **very** profitable

Law firm business platforms are **less complex** than other businesses

No wholesale providers to buy from, no inventory to warehouse, less variable expenses

Fixed expenses consisting of rent, personnel wages, IT infrastructure, and marketing

Profitability of law firms is under pressure from “**commoditization**”

Commoditization is **not less complex volume, driven work**

Attorneys

Administrative
Support Staff

Clients tend to view law firms as the same with **equal competencies**

Hiring decisions by clients are being made by the **cost of the legal service**

Law firms are **revenue driven**



Drop In Gross Revenues

\$ 100.00	Total Gross Revenues
<u>-55.00</u>	Total Expenses
\$ 45.00	Net Profit (45%)

10% Percent Drop in Gross Revenues

\$ 90.00	Total Gross Revenues
<u>-55.00</u>	Total Expenses
\$ 35.00	Net Profit (35%)

22% Drop in Net Income

\$ 35.00	Net Profit
<u>-45.00</u>	Net Profit
\$ -10.00	Net Profit Loss ($\$ -10.00 / \$ 45.00 = -22.2\%$)



Volume and Price Variance

Last Year: 100 matters with an average collection amount of \$3,000

\$300,000

Volume Variance: 120 matters with an average collection amount of \$3,000

\$360,000

Price Variance: 100 matters with an average collection amount of \$3,600

\$360,000

Which is more "doable"? A 20% increase in new cases? Or a 20% increase in pricing?

Volume + Price Variance: 110 matters (10% increase) with an average collection amount of \$3,400 (13.3% increase)

\$374,000



Self-Leverage

Solo Office - Matter Budget: 45 Billable Hours

Partner Level Work	10 Hours @ \$ 350 per Hour = \$ 3,500
<i>Associate Level Work</i>	<i>20 Hours @ \$ 225 per Hour = \$ 4,500</i>
<i>Paralegal Level Work</i>	<i>15 Hours @ \$ 125 per Hour = \$ 1,875</i>
Total	\$ 9,875

Blended Rate (\$ 9,875 / 45 Hrs.) = \$ 219 per Hour

Contract Help Matter Budget: 45 Billable Hours

Partner Level Work	10 Hours @ \$ 350 per Hour = \$ 3,500
<i>Associate Level Work (\$75 per Hr.)</i>	<i>20 Hours @ \$ 150 per Hour = \$ 3,000</i>
<i>Paralegal Level Work (\$40 per Hr.)</i>	<i>15 Hours @ \$ 85 per Hour = \$ 1,875</i>
Total	\$ 8,375
Less Solo Amount	<u>(\$ 9,875)</u>
Net Cash Loss	<u>(\$ 1,500)</u>

Opportunity Hours: 20 + 15 = 35

Use 21 (60%) of the Opportunity Hours For Additional Marketing

Use 14 (40%) of the Opportunity Hours For Billable Time (14 * \$350 = \$ 4,900)



Time Value Index

- 1. Estimates “Value” of the time worked in a day/week**
- 2. Value is highest probability of creating firm revenues**
- 3. Helps with daily/weekly time management**
- 4. Identifies “time hogs”**
- 5. Creates real-time awareness of what you are doing**
- 6. Helps identify who you should hire first or next**



Time Value Index

	MONDAY		WEEKLY TVI
	DATE	7/13/2015	7/13 - 7/17/15
	Category	Hours	Hours
BD	1	3.00	6.00
PRTW	2	2.00	9.00
OWN	3		3.00
FINACC	4		9.00
ASSCW	5		2.00
ADM	6	5.00	13.00
PLW	7		3.00
PER	8		3.00
	TOTAL HOURS	10.00	48.00
	DAILY TVI	3.70	4.21

Pros and Cons of Cloud Tools

- Pros

- Reduced upfront costs (IT, software)
- Enhanced security
- Hurricane ready, low downtime
- Personal choice; OS and device agnostic
- Access data anywhere
- Productivity tools for remote teams
- Connectivity with clients
- Back up your data
- Cloud services talk to each other
- Innovation
- Less time to get basic things done
- Built-in efficiencies means more money for you

- Cons

- Dependent on Internet
- Higher fixed costs
- Who owns the data – check Terms of Service
- You are only as reliable as the service you use
- Multiple services may not talk to each other
- Hackability of your data
- Web apps not as flexible or powerful
- Back up your data

Traditional vs. Cloud Costs

Hardware	\$2,500.00		Clio	840.00
Software + Maintenance	\$2,000.00		Communications	235.00
Backup	\$1,000.00		Receptionist (most expensive plan)	9,228.00
Office Space	\$12,000.00		Phone	1,500.00
Receptionist	\$28,000.00		Office Space	6,000.00
Paper	\$2,000.00		Document Management	1,700.00
Phone System	\$3,600.00		Backups	360.00
Billing (Accounting and Collections)	\$2,000.00		CRM, Note Taking	240.00
Malpractice Insurance	1500.00		Malpractice Insurance	1500.00
FIXED COSTS	\$54,600.00		FIXED COSTS	21,503.00
1 st Year Net Income	\$36,000.00		1 st Year Net Income	\$36,000.00
Firm Revenue	\$90,600.00		Firm Revenue	\$57,503.00
Monthly Target	\$7,550.00		Monthly Target	\$4,791.91
\$200/hour rate	38 hours		Actual Billings	7,600.00
			Actual Profit	69,697.00
			The Cloud Difference	33,097.00

Demo

- Google Chrome
- Google Mail
- Google Calendar
- Google Tasks
- Google Contacts
- Google Drive
- Docs, Sheets, Slides
- Clio
- Avvo

Google Mail

Chrome File Edit View History Bookmarks People Window Help Sun Apr 26 6:46 PM

Inbox - abid@hussainlaw.com Google+

https://mail.google.com/mail/u/0/?shva=1#inbox?compose=14cf81fbd12e4877%2Cnew

HUSSAIN LAW LLC

+Abid

Mail

COMPOSE

Inbox

- Starred
- Sent Mail
- Drafts (1)
- 1-Clients
- 2-DanceDevelopments
- 3-PatentDive
- 4-Receipts
- 5-Marketing
- 6-Disruption
- Administrative
- BE
- Coding
- Family
- Friends
- Judson
- Miscellaneous
- Nebulae
- NOLA
- Research
- More

Search people...

- Jessica Costa
- Justin Ghazi
- Pedro Costa
- Simon Hussain
- Ryan Duhon
- Danilo Bandovic
- Earl Scioneaux
- Martyn Mackrory


Star	Sender	Subject	Category	Time
<input type="checkbox"/>	Tereson, me (4)	Letter / Invento		
<input checked="" type="checkbox"/>	Bessie Goggins	3-PatentDive	3-PatentDive	pm
<input checked="" type="checkbox"/>	Bessie Goggins	3-PatentDive	3-PatentDive	pm
<input checked="" type="checkbox"/>	Bessie Goggins	3-PatentDive	3-PatentDive	pm
<input checked="" type="checkbox"/>	Bessie Goggins	3-PatentDive	3-PatentDive	pm
<input checked="" type="checkbox"/>	Bessie Goggins	3-PatentDive	3-PatentDive	pm
<input type="checkbox"/>	Christopher, Brian, me (4)	Fwd: Register		24
<input type="checkbox"/>	Brian, Chris, me (4)	GW Software		24
<input type="checkbox"/>	dexter ... John, me (15)	1-Clients	1-Clients	24
<input type="checkbox"/>	Jody .. Lee, Abid (15)	Contract/ Paym		23
<input type="checkbox"/>	Kristy, me (3)	LSBA Four Co		23
<input type="checkbox"/>	Kristy Nunez	LSBA Four Co		23
<input type="checkbox"/>	Kerri, me (2)	LLC		22
<input type="checkbox"/>	Landon, me (2)	ifo.audio -- Exe		16
<input type="checkbox"/>	Arthur&, me (5)	Ayala trust		15
<input type="checkbox"/>	Bea, me (2)	Ayala Family T		15
<input type="checkbox"/>	Eric Leininger	Fwd: Re:		13
<input type="checkbox"/>	Mitchell Klein	software licens		13
<input type="checkbox"/>	Arthur& Liz Ayala	update Ayala T		10
<input type="checkbox"/>	Jody, Abid, Jody (5)	2-DanceDevel	2-DanceDevel	9
<input type="checkbox"/>	Shawn, me (2)	A TechShow s		9
<input type="checkbox"/>	Roger, me (2)	1-Clients	1-Clients	9
<input type="checkbox"/>	Ryan, me, Terrance (14)	1-Clients	1-Clients	30
<input type="checkbox"/>	Brian, me (2)	Vending Health		30
<input type="checkbox"/>	Ryan, Brian, me (4)	Re: Entities		25
<input type="checkbox"/>	me, Ryan (4)	Closing the loo		

LLC Formation

Sarah Bogus (gmail.com)

LLC Formation

Here's a picture:



Abid Hussain
Attorney, Hussain Law LLC

Sans Serif

Send

Tasks: 1-Now

- DD: Maddy Martens
Related email
- Cattywampus Members
Related email
- NOPC BOD minutes and meeting announcement
Related email
- PD: Legal Zoom terms of service.
Related email
- Abid Hussain - CV
Related email
- Walter: Promissory Note
Related email
- Shelly: OA
Related email
- Ok, we're getting close on the OA
Related email
- Chambers: Payment for L.U.M. contract
Related email
- To Do List for Dance Developments
Related email
- To Do List for Dance Developments
Related email
- Waiver for Sean and Simon
Related email
- Dex: List of contractors
Related email
- ABA Tech Show

New Message

Google Calendar

The screenshot displays a Google Calendar interface within a Chrome browser window. The browser's address bar shows the URL https://www.google.com/calendar/render?tab=oc#main_7. The calendar is set to a weekly view for the period from Sunday, April 26, to Saturday, May 2, 2015. The time zone is GMT-06.

Calendar Events:

- Sun 4/26:** Amex Bill Due on 3rd, Pay Verizon Bill due on, Lennie and Lisa's Anniv, Pay Verizon Bill due, 8p - 12 Sweet Crude at One Eyed Jacks.
- Mon 4/27:** Pay Cox Bill (charmaine), Last Relly Class of the, Pay Cox Bill (Abid Hi, 11:30 - 1:30p Marketing, 3p - 6p Pick up Simon Kumor, 3:40p - 4:40p Kumon, 4:30p - Teach WERQ at Relly, 6:30p - 7:30p Teach Zumba at Elmwood, 8:30p - Put out trash at, 9p - Phone Discussion.
- Tue 4/28:** Joanne Giampietro's, (jcavignac@couhigpa rtners.com), 11:30 - 1p Lunch with Ed F. and his lawyer group, 4p - Practice Panther I, 9p - 11p Hildegard Album Release at Gasa Gasa.
- Wed 4/29:** 1:30p - 2:30p SPX Sock Hop, 6p - 9p Launch Fest D, 6p - 8p Wednesdays at the Squan, 6:30p - Weekly Stand up.
- Thu 4/30:** 11am - 11pm (Large blue block), 7p - 8p Teach WERQ, 8:30p - Put out trash at.
- Fri 5/1:** Pay Kumon, Start on ConocoPhillips, 5p - 7p The Dupuy Annual Jaz Party (charmaine@gmail.co), 5p - 7p The Dupuy's Annual Jazz Fest Party.
- Sat 5/2:** 11 - 1p Kumon, 2p - 3:30p Ron Cardenas - Ableton Session (rawrios@outlook.co).

Tasks List (1-Now):

- DD: Maddy Martens [Related email](#)
- Cattywampus Members [Related email](#)
- NOPC BOD minutes and meeting announcement [Related email](#)
- PD: Legal Zoom terms of service. [Related email](#)
- Abid Hussain - CV [Related email](#)
- Walter: Promissory Note [Related email](#)
- Shelly: OA [Related email](#)
- Ok, we're getting close on the OA [Related email](#)
- Chambers: Payment for l.u.m.-contract [Related email](#)
- To Do List for Dance Developments [Related email](#)
- To Do List for Dance Developments [Related email](#)
- Waiver for Sean and Simon [Related email](#)

Google Drive

The screenshot shows a Google Drive interface in a Chrome browser window. The address bar displays the URL: https://drive.google.com/drive/u/0/#folders/0B_g5DzIY7aDDajhSbHFSQjh0R3c/0B_g5DzIY7aDDSHdTSTRuSzkwQJk. The page header includes the Google Drive logo, a search bar, and the user's name 'Abid'. The breadcrumb navigation shows 'My Drive > Law > Forms'. A sidebar on the left lists various folders, with 'Forms' highlighted. The main content area displays a table of files and folders.

Name	Owner	Last modified	File size
ABA Advising The Small Business, Forms & Advice	me	Oct 16, 2013 me	—
Answers and Pleadings	me	Oct 16, 2013 me	—
Assignments	me	Oct 16, 2013 me	—
Business Transactions	me	Oct 16, 2013 me	—
Deeds of Trust	me	Oct 16, 2013 me	—
Deficiency Judgement	me	Oct 16, 2013 me	—
Employment Contract	me	Nov 24, 2014 me	—
Finder's Fee	me	Nov 24, 2014 me	—
Foreclosure	me	Oct 16, 2013 me	—
FormDisk	me	Oct 16, 2013 me	—
FRCP Forms	me	Dec 27, 2013 me	—
HLF	me	Oct 16, 2013 me	—
Leases	me	Oct 16, 2013 me	—
Letters of Intent	me	Oct 16, 2013 me	—
Loans	me	Oct 17, 2013 me	—
Medical Release	me	Oct 16, 2013 me	—
Music Contracts	me	Nov 24, 2014 me	—
NDA's and Confidentiality Agreements	me	Oct 16, 2013 me	—
Owner Finance Package	me	Oct 16, 2013 me	—
Partnerships	me	Oct 16, 2013 me	—
Power of Attorney	me	Oct 16, 2013 me	—
Prodoc	me	Nov 24, 2014 me	—
Promissory Notes	me	Feb 1, 2014 me	—
Property Transfers	me	Oct 16, 2013 me	—
Purchase of a Business	me	Nov 24, 2014 me	—
Settlement and Release	me	Nov 24, 2014 me	—
TheFormTool	me	Nov 24, 2014 me	—

Google Docs

Safari File Edit View History Bookmarks Window Help Sun Apr 26 7:28 PM

Organizational Meeting Minutes - Google Docs

https://docs.google.com/document/d/1zD8zfo3O7oIlqONpqs8Iq36745MjnKSR8N7qz1rZOM/edit

Organizational Meeting Minutes - Google Docs

My Drive - Google Drive

Organizational Meeting Minutes ☆

File Edit View Insert Format Tools Table Add-ons Help Last edit was made 3 minutes ago by Abid Hussain

producer909@gmail.com

Comments Share

100% Normal text Times New... 12 B I U A

Editing

MINUTES OF THE ORGANIZATIONAL MEETING OF THE MANAGER OF BOGUS ENTERPRISES LLC A LIMITED LIABILITY COMPANY

The organizational meeting of the Manager of BOGUS ENTERPRISES LLC (hereinafter the "Company") was held at 4035 WASHINGTON AVENUE, NEW ORLEANS, LOUISIANA 70125, on May 1, 2012.

The following Manager attended the meeting: Abid Hussain. The undersigned waived notice of the meeting as evidenced by the attached Waiver of Notice signed and appended hereto.

Abid Hussain was designated chairman of the meeting, and Abid Hussain was designated secretary.

ARTICLES OF ORGANIZATION

The secretary then presented and read to the meeting a copy of the Articles of Organization and reported that on April 12, 2013, the original thereof was filed in the office of the Secretary of State of the State of Louisiana and that the Secretary of State issued a formal Acknowledgment of Filing to the company on that date.

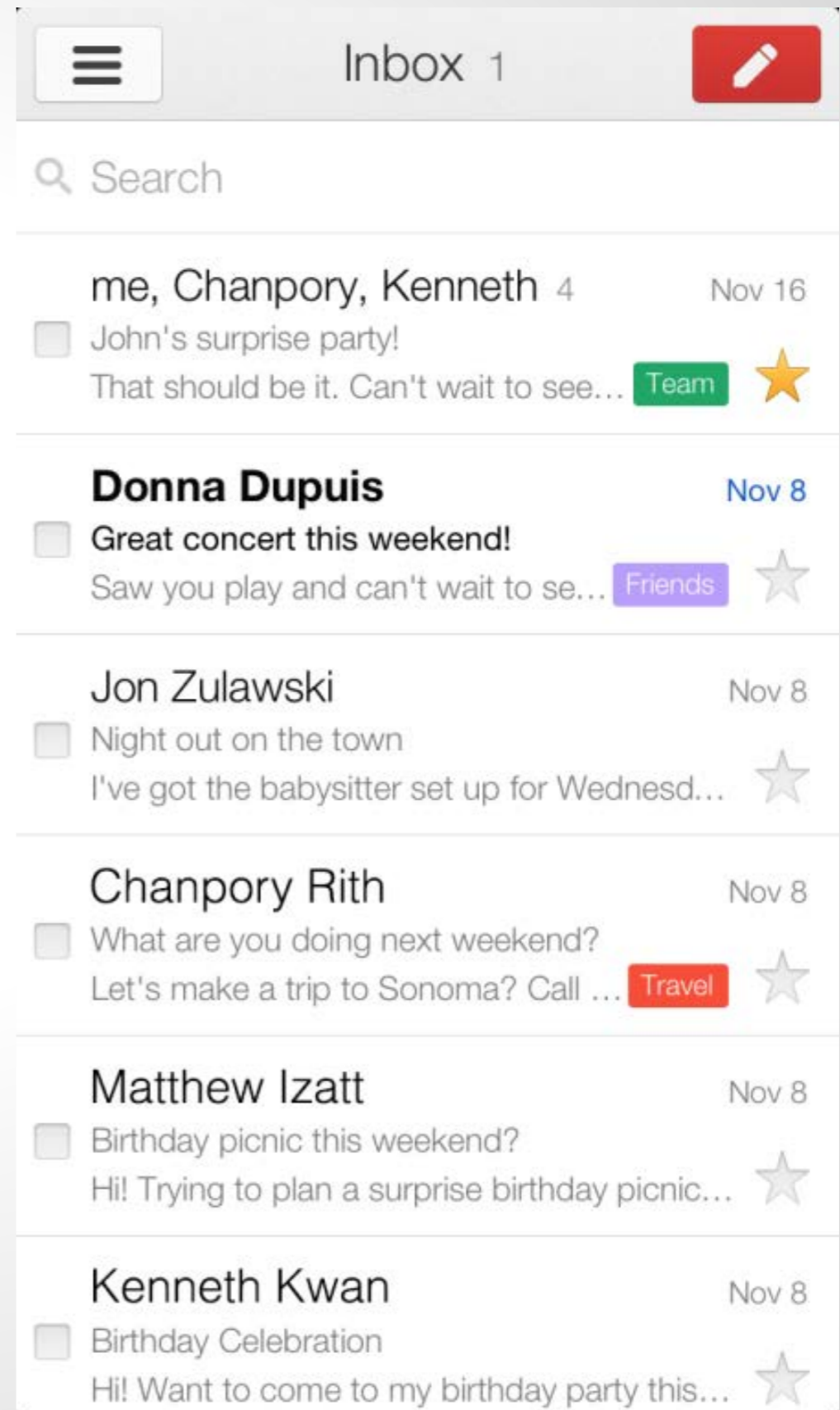
Upon motion duly made, seconded and carried, it was:

RESOLVED, that the Articles of Organization be accepted and approved in all respects.

COMPANY AGREEMENT

Gmail and Calendar App

- Same search options as Gmail
- Tagging, filing, archiving
- Access to All Mail
- Multiple accounts, signatures consistent



Clio

The screenshot displays the Clio web application interface. At the top, there is a navigation bar for 'Hussain Law LLC' with various menu items like Practice, Calendar, Tasks, Matters, Contacts, etc. The main content area shows the 'Matters' page for 'Entity Formation - Bogus Enterprises LLC'. Under the 'Time' tab, there is a 'Time Entries' section with a table of recorded time. The table has columns for Date, Description, User, Rate, and Total. Four entries are listed for the date 04/26/2015, all by user 'Abid Hussain'. The total time recorded is 5.00 hours, valued at \$1,125.00. On the right side, there is a calendar for April 2015, an agenda with items like 'Pay Verizon Bill' and 'Amex Bill Due', and a 'RECENT' list of matters.

Entity Formation - Bogus Enterprises LLC

Info Client Transactions Contacts Tasks Calendar Notes **Time** Expenses Bills Documents Communications Clio Connect

Time Entries ADD

Select All Filter ▾

	Date	Description	User	Rate	Total
<input type="checkbox"/>	04/26/2015	Drafted company operating agreement based on client's and client's business partner&# (more)	Abid Hussain 2.00	\$225.00	\$450.00
<input type="checkbox"/>	04/26/2015	Drafted initial organizational resolutions based on interview with client.	Abid Hussain 1.00	\$225.00	\$225.00
<input type="checkbox"/>	04/26/2015	Acquired EIN after interviewing client regarding tax matters and needs.	Abid Hussain 1.00	\$225.00	\$225.00
<input type="checkbox"/>	04/26/2015	Filed formation documents with the Louisiana SOS.	Abid Hussain 1.00	\$225.00	\$225.00
				5.00	\$1,125.00

AGENDA

- All Day Pay Verizon Bill du
- All Day Amex Bill Due on 3r
- 08:00 PM Sweet Crude at O

TIMEKEEPING

No timer running.

RECENT

- 00389-Bogus
- Sarah Bogus
- 00218-Bogus
- 00385-Yasin
- 00388-Barksdale
- David Barksdale

Clio Billing



643 Magazine Street, Suite 102
New Orleans, LA 70130
United States

Sarah Bogus

00389-Bogus

Entity Formation - Bogus Enterprises LLC

Type	Date	Description	Quantity	Rate	Total
Service	04/26/2015	Filed formation documents with the Louisiana SOS.	1.00	\$225.00	\$225.00
Service	04/26/2015	Acquired EIN after interviewing client regarding tax matters and needs.	1.00	\$225.00	\$225.00
Service	04/26/2015	Drafted initial organizational resolutions based on interview with client.	1.00	\$225.00	\$225.00
Service	04/26/2015	Drafted company operating agreement based on client's and client's business partner's needs.	2.00	\$225.00	\$450.00
			Total		\$1,125.00

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
5646	05/11/2015	\$1,125.00	\$0.00	\$1,125.00
			Outstanding Balance	\$1,125.00
			Total Amount Outstanding	\$1,125.00

INVOICE

Invoice # 5646
Date: 04/26/2015
Due On: 05/11/2015

Chrome File Edit View History Bookmarks People Window Help

Inbox - abid@hussainlaw... x Google+ x My Drive - Google Drive x Organizational Meeting M... x LawPay

LawPay (AffiniPay LLC) [US] https://secure.lawpay.com/pages/hussainlaw/operating

HUSSAIN LAW LLC

Hussain Law LLC
643 Magazine Street
Suite 102
New Orleans, LA 70130
Phone: (888) 789-7250
Web: <http://www.hussainlaw.com>

Invoice Payment

Payment Detail

Amount

Total \$0

Additional Details

Client Name

Billing Information

Name on Card

Email

Billing Address

Billing Address 2

City

Please make all checks payable to: Hussain Law LLC,
or pay your invoice online at <http://hussainlaw.com/invoice>.

Foonberg's Client Appreciation Curve

Optimal Time To Get Paid



**Client REALLY
LOVES You**

**Client Has Somewhat
Warm Feelings For You**

**Client Cannot Believe He
Has To Pay You Several
Thousand Dollars**

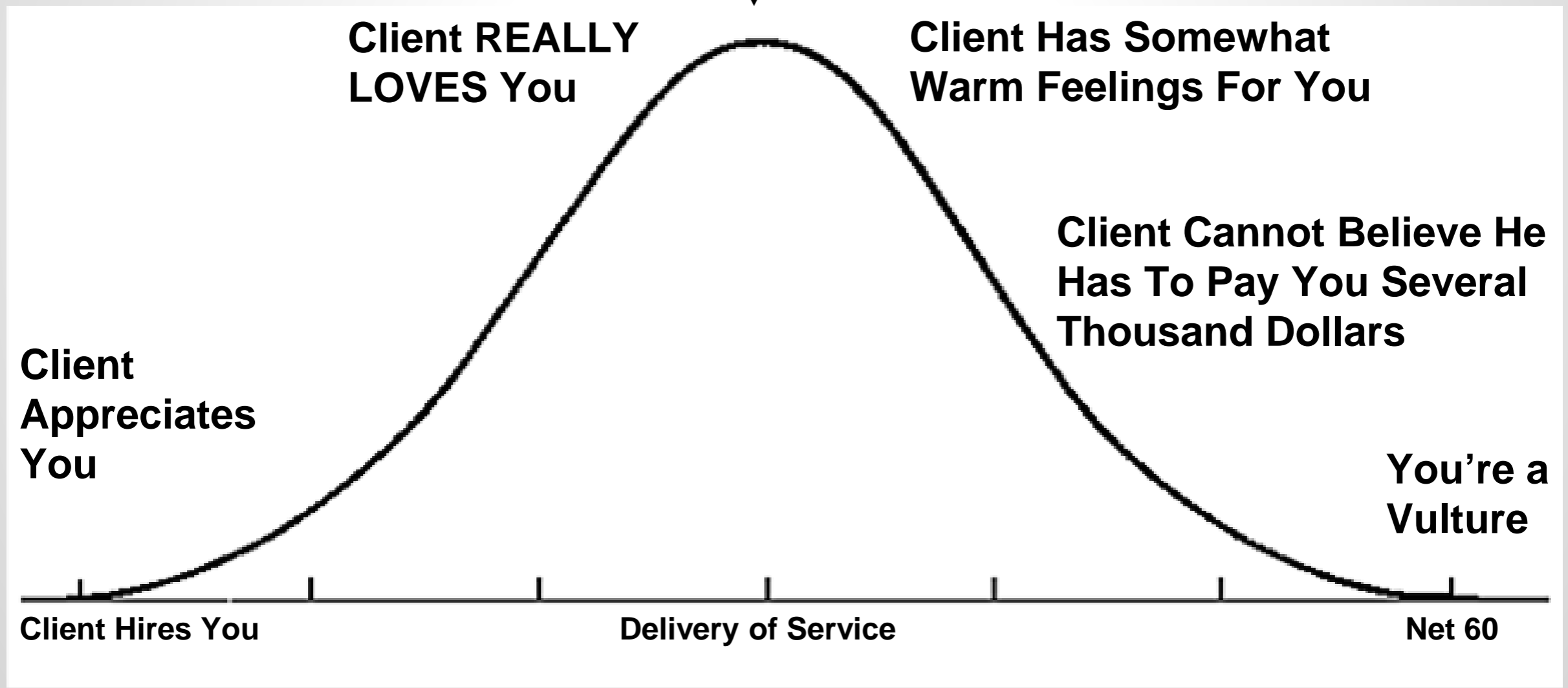
**Client
Appreciates
You**

**You're a
Vulture**

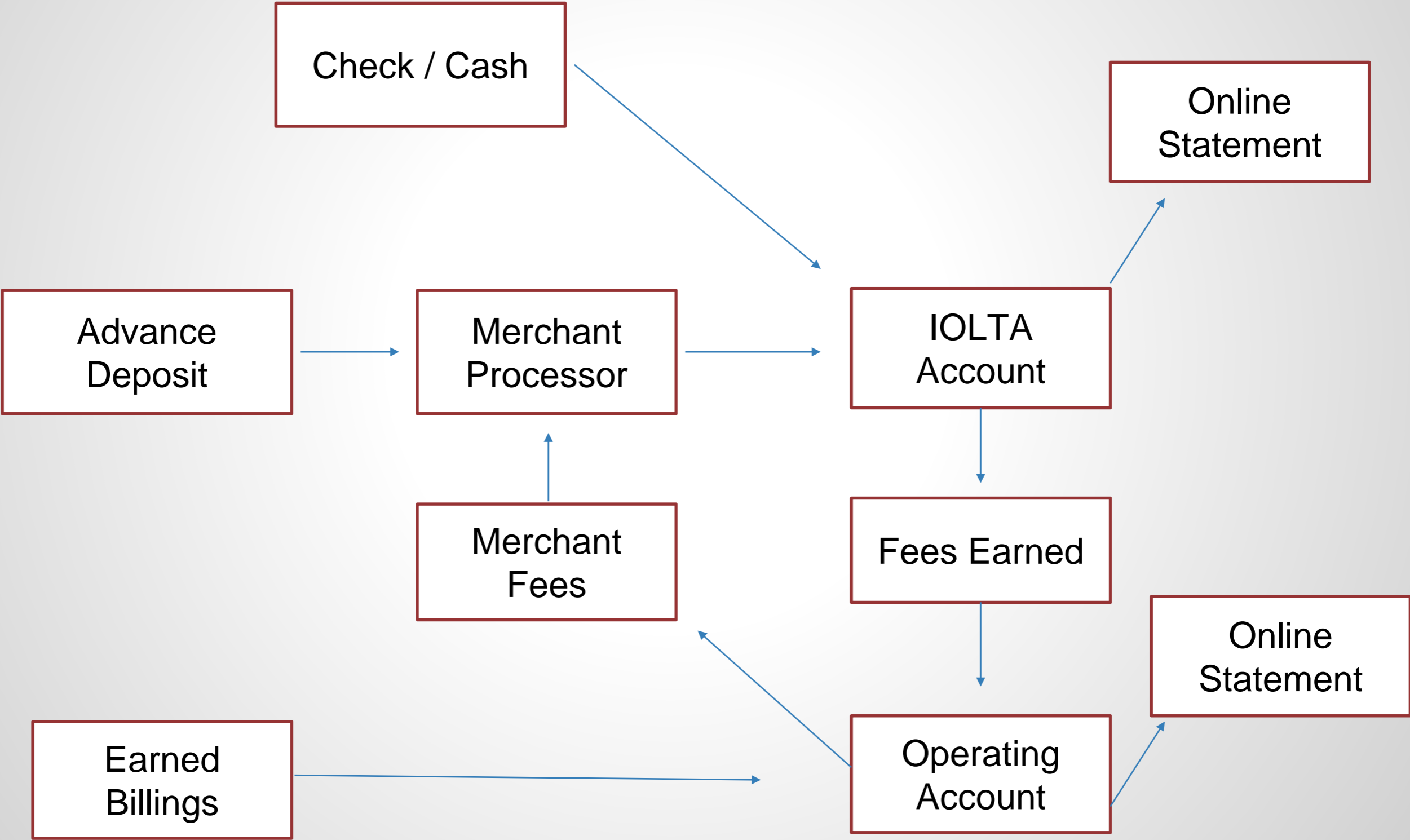
Client Hires You

Delivery of Service

Net 60




Paperless Trust Accounting



Advance Deposit

- Client Engagement – Spells out if the money is an advance deposit
- Advance is collected directly into IOLTA
 - LawPay is my preferred merchant
- The amount is logged into the client matter

http://hussainlaw.com/trust

HUSSAIN LAW LLC 

Hussain Law LLC
643 Magazine Street
Suite 102
New Orleans, LA 70130
Phone: (888) 789-7250
Web: <http://www.hussainlaw.com>

Trust Payment

Advance Deposit for Legal Services

Amount \$

Total \$0.00

Additional Details

Client Name

Billing Information

Name on Card

Email

Billing Address

Billing Address 2

City Select State

Zip / Postal Code United States

Card Information

Card Number CVV

Exp.

Clio Transactions

Client **Transactions** Contacts Tasks Calendar Notes Time Expenses Documents Communications Clio Connect

Ledger

Add

IOLTA Trust

Date	Source/Recipient	Reference	Fees	Payments	Balance
07/25/2014	client	1263		10,000.00	10,000.00
Edit	Delete				

New Transaction



Record Transaction Transfer Funds Transfer Funds Matter-to-Matter

Account

IOLTA

Amount

0.0

Date

required

10/31/2016

Source/Recipient

Type

Currency

Exchange rate

Description

Check or Reference

Client

Abid Hussain

Matter

00440-Hussain

Record Transaction or Cancel

Invoices

- Generate an invoice per client or per matter
- Apply trust funds toward the invoice
- If using Freshbooks, create a “Credit”
- Generate a client ledger
- Provide client ledger with each invoice

Apply Payments from Trust Funds

Date required

07/28/2014

Description

Payment for invoice #61

Matter	Source	Destination	Due	Payment
00002-Cramer:	Direct Paymen... ▲	Draper Firm O... ▼	135.00	135.00
Interest:	Direct Payment (Cash)	Draper Firm O... ▼	4.45	4.45
	Draper Law Trust Account: \$409.00 (Client Balance)			
	Draper Firm Operating Account: \$0.00 (Client Balance)			
	IOLTA Trust: \$0.00 (Client Balance)			
			Subtotal	139.45
			Total Payment	139.45
			Balance Due	0.00


Receive Payment or Cancel

Client Ledgers

Client **Transactions** Contacts Tasks Calendar Notes Time Expenses Documents Communications Clio Connect

Ledger **Matter Level Accounting Detail**

Add

IOLTA Trust 

Date	Source/Recipient	Reference	Fees	Payments	Balance
07/09/2014	client	12457-47	Client Deposit	1,000.00	1000.00
					Edit Delete
07/09/2014	Transferred to: Draper Firm Operating Account for invoice #792		Client Payment 400.00		600.00
					Edit Delete
			400.00	1,000.00	600.00

Trust Account Ledgers

Trust Ledger Report (07/28/2014)

Jennifer Adam

IOLTA Trust

Date	Source/Recipient	Reference	Matter	Funds Out	Funds In	Balance	
04/16/2014	Client/Don	82643	00061-Adam		500.00	500.00	
Retainer balance							
04/16/2014	Transferred to: Draper Firm Operating Account for invoice #136		00061-Adam	500.00		0.00	
Payment for invoice #136							
				Closing Balance:	\$500.00	\$500.00	\$0.00
				Client Total:	\$500.00	\$500.00	\$0.00

Compliant Invoices

Type	Date	Attorney	Description	Quantity	Rate	Total
Service	07/15/2014	DD	Consultation - In Person: Discussed matter	0.50	\$225.00	\$112.50
Quantity Subtotal				0.5		
					Subtotal	\$112.50
Quantity Total				2.5		
					Subtotal	\$3,112.50
					Total	\$3,112.50
From Client Trust Funds Payment (07/28/2014)						-\$600.00
					Balance Owing	\$2,512.50

Statement of Account

Outstanding Balance	New Charges	Payments Received	Total Amount Outstanding
(\$0.00	+ \$3,112.50)- (\$600.00	= \$2,512.50

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
807	08/21/2014	\$3,112.50	\$600.00	\$2,512.50
Outstanding Balance				\$2,512.50
Total Amount Outstanding				\$2,512.50

IOLTA Trust

Date	Type	Description	Matter	Receipts	Payments	Balance
07/09/2014	cheque	retainer received within Trust	00095-Payne		\$1,000.00	\$1,000.00
07/09/2014		Payment for invoice #792	00095-Payne	\$400.00		\$600.00
07/28/2014		Payment for invoice #807	00095-Payne	\$600.00		\$0.00
Amount Remaining in Trust IOLTA Trust Balance						\$0.00

Transfers

- Use paperless online transfers
- Clearly mark all transfers with details
- Details include matter number, client number, invoice number
- Keep a record of the transfer in your client notes or other tracking system

Bank Transfers



Transfer Money

▶ Repeating Transfers

▶ Transfer Activity

▶ Transfers Pending Approval (0)

▶ External Accounts

▶ Add an External Account

Have Questions?

▶ When will you transfer my money?

▶ What is a repeating transfer?

▶ What is an external account?

+ Show more...

FAQs & Demos ▼

All fields are required unless otherwise noted.

Steps **1** 2 ✓

Transfer from: Law Louisiana IOLTA (...7661):

Transfer to: Law Louisiana (...0983):

Need to pay your Chase credit card or loan? Go to [Pay Bills](#).
Paying a person? Try [Chase QuickPaySM](#).

Amount: \$ 300

Memo: Allman, Invoice 5721

Optional - 32 Maximum Character Limit

One-time or repeating?: One-time
 Repeating

Transfer date: 10/28/2016

Next

Create A Paperless Trail

00428-Allman

CLIO CONNECT NEW QUICK BILL EDIT MATTER ▾

General Corporate Counsel

Info

Add Note ✕

Not

Subject

Date

Note

Date

No R

Save or [Cancel](#)

Ethics

- 20 state bar associations have issued opinions stating that using the Cloud is ethical.
- A lawyer may use an online data storage system to store and back up client confidential information provided that
 - the lawyer takes **reasonable care** to ensure
 - that confidentiality will be maintained in a manner consistent with the lawyer's obligations under Rule 1.6.
- In addition, the lawyer should
 - stay abreast of technological advances to ensure
 - that the storage system remains sufficiently advanced to protect the client's information,
 - and should monitor the changing law of privilege to ensure that storing the information online will not cause loss or waiver of any privilege.
- **Client should provide Informed Consent** in client engagement letters for Cloud services
- Ethics opinions are available at https://www.americanbar.org/groups/departments_offices/legal_technology_resources/resources/charts_fyis/cloud-ethics-chart.html