

The Future of the Legal Profession: Making Strides with Technology

Abid Hussain

Hussain Law LLC

abid@hussainlaw.com

<http://hussainlaw.com>

888-789-7250

Jessica Vasquez

The Vasquez Law Office

jvasquez@vasquezlawoffice.com

<http://vasquezlawoffice.com/>

(504) 571-9582

Roadmap

- About Our Practice
- Why We Need the Cloud
- How the Cloud Puts Money In Our Pockets
- Cloud-Based Ecosystems
- Essential Online Apps
- Paperless Trust Accounting



About Our Practice

- **Practice**
 - Mobile, paperless law practice; clients in multiple cities;
 - We do the marketing, IT, accounting, and legal departments;
- **Today's Goals**
 - Make you less afraid of using web technologies to make your practice more efficient.
 - Be nimble, responsive, and profitable, and do it securely.

Issues With Traditional Paradigm

- Hardware
 - Obsolete almost immediately.
- Software and Support
 - Constant high cost of maintenance and updates.
- Backups
 - Tape, drives, or other esoteric “solutions” are only as good as your last backup; performance issues.
- Physical Office Space
 - Multi-year leases; high fixed costs; lack of mobility.
- Receptionists
 - High fixed costs; inefficient use of resources.
- Paper, Paper, Paper!!
 - OMG, OMG, OMG!!
- Document Management Systems
 - Version control, searching, backups, growth.
- Phone Systems
 - Fixed costs, same issues with hardware.
- Billing Systems
 - Downtime incurred in order to get bills out the door and get paid.

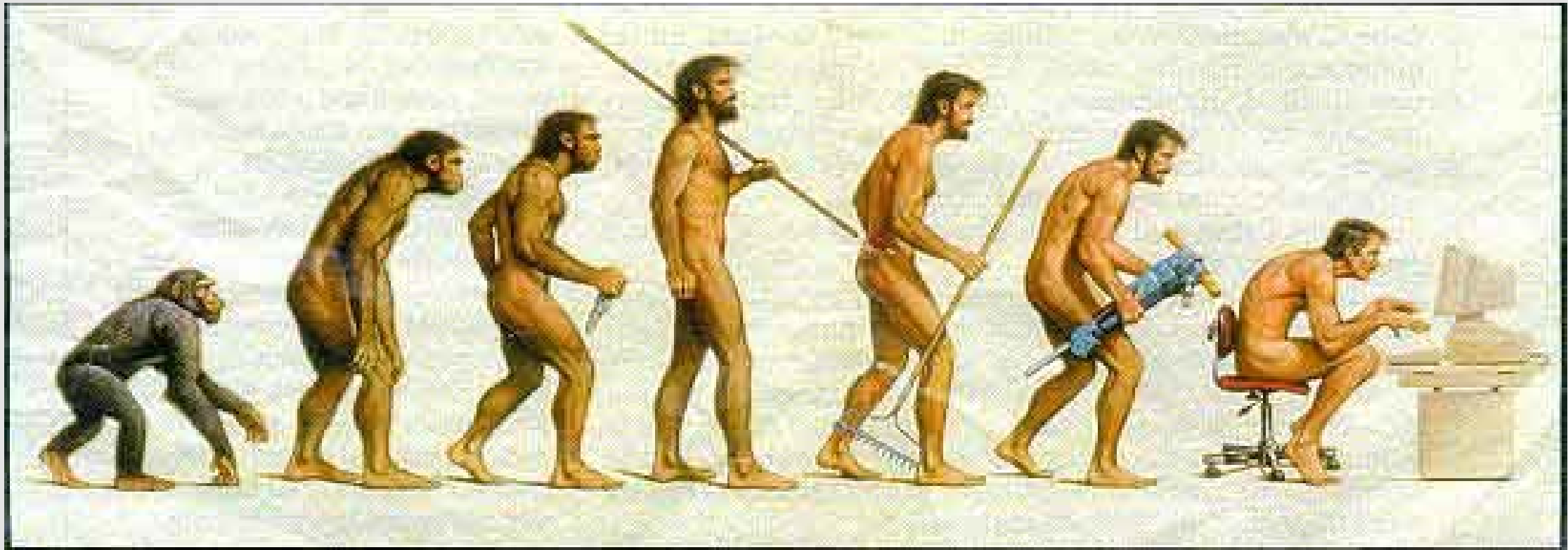


Modern Trends

- Speed of Services
 - Be nimble, respond to clients' needs, turn on a dime.
- Mobility
 - Meet clients where convenient; don't get bogged down by an office; don't compromise where you want to set up shop
- Less/No Paper
- Accessibility to the Lawyer
 - Schedule phone calls automatically; respond via email.
- Leveraged Technology
 - Don't buy obsolete hardware; IT services are outsourced to the Cloud.
- Appropriate Resources
 - Pay your skilled staff for billable services, not answering phones or making coffee.
- Efficient Billing
 - Get paid and reduce receivables. Be cash flow positive on your first month.

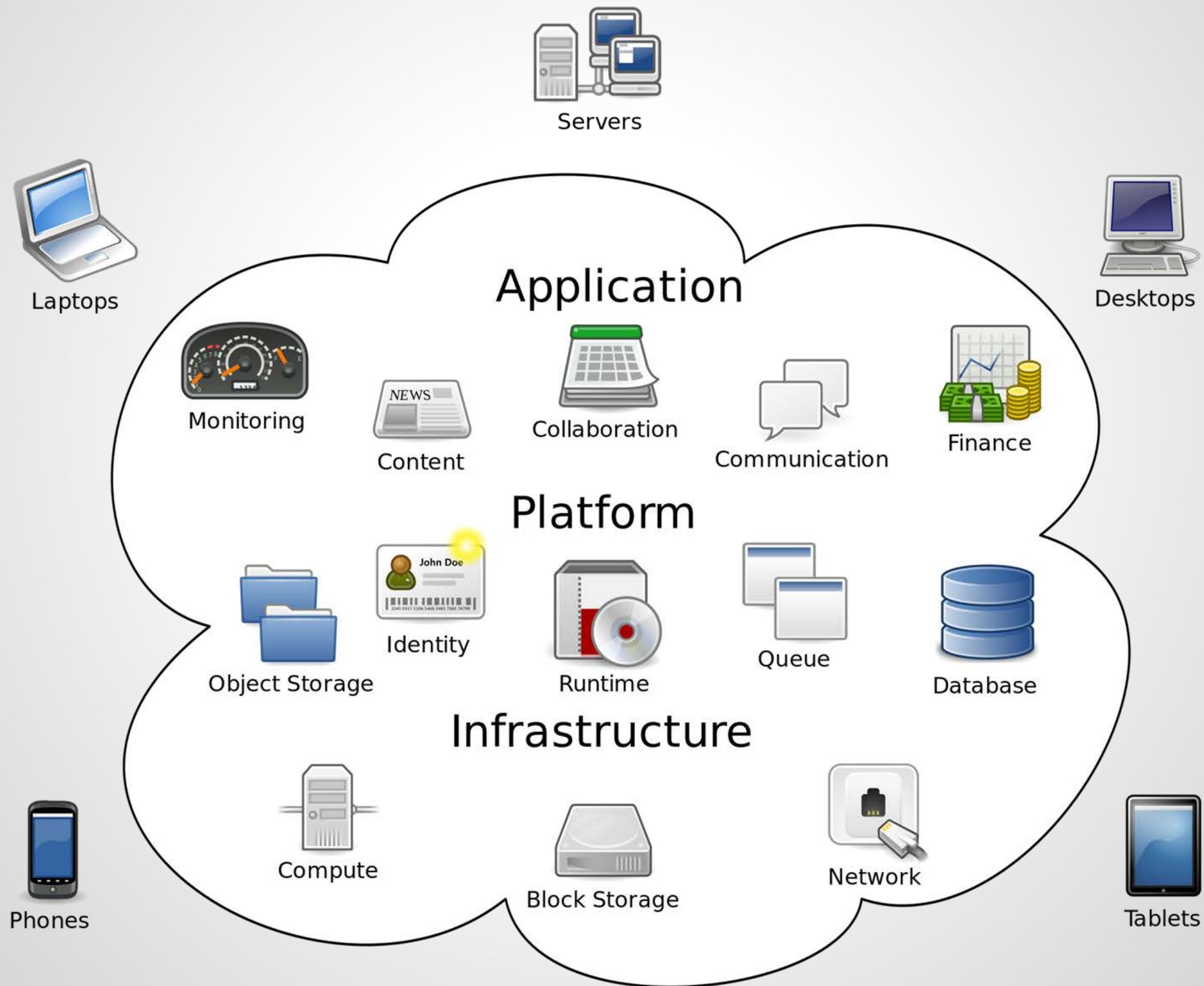
The Cloud – Defined

- Cloud computing is computing delivered as a service over the Internet, with less need for software on your computer



- The philosophy of the Cloud:
 - How you get your work done
 - Elasticity of resources
 - Ease of having access to those resources
 - User-determined scalability

How The Cloud Works



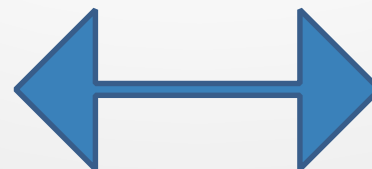
Pros and Cons

- 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

- 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



Tools Of The Cloud For Lawyers



intuit®



 Office 365



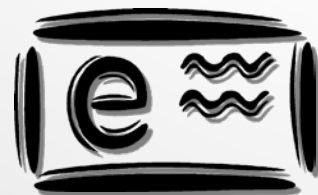
Practice Management

- Practice management is software that combines your

- Calendar
- Task List
- Contacts

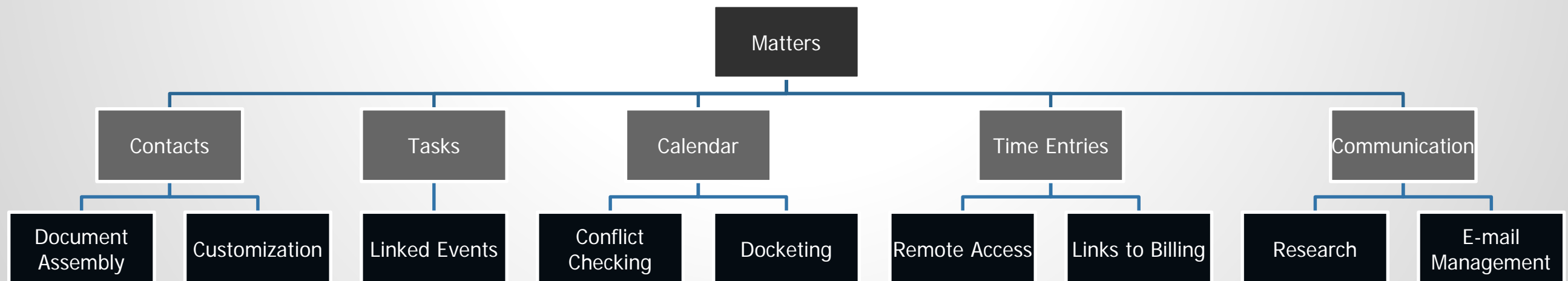


- And adds communication and time entries...



Practice Management

- Most importantly, practice management software focuses on Matters, thinks like you think, and gets out of your way, allowing you to manage the multiple areas of your practice.



Cloud Services

- Time, Billing, and Practice Management
- Communications and Calendars
- Phone Systems
- Legal Research
- Office Space
- Document Management
- Hardware and Software
- CRM, Note Taking, Utilities

Pitfalls to Avoid

- Long-Term Contracts
- All-in-one hardware
- Paper
- High fixed costs
- Lack of portability – be able to ditch any service you don't like and easily take your data with you

Reduced Fixed Costs

- Legal Research
- Hardware
 - Consider longevity of your hardware as part of your fixed costs.
- The lower your fixed costs, the higher the likelihood that you will succeed.

Old vs. Cloud

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	1000.00
FIXED COSTS	\$54,600.00		FIXED COSTS	21,003.00
1 st Year Net Income	\$36,000.00		1 st Year Net Income	\$36,000.00
Firm Revenue	\$90,600.00		Firm Revenue	\$57,003.00
Monthly Target	\$7,550.00		Monthly Target	\$4,750.25
\$200/hour rate	38 hours		Actual Billings	7,600.00
			Actual Profit	70,196.00
			The Cloud Difference	33,597.00

Demo

- Document Collaboration
- Spreadsheet Collaboration
- Team Communication

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

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

Chad B. McKee

Tereson, me (4) Letter / Invento

Bessie Goggins 3-PatentDive

Bessie Goggins 3-PatentDive

Bessie Goggins 3-PatentDive

Bessie Goggins 3-PatentDive

Bessie Goggins 3-PatentDive

Christopher, Brian, me (4) Fwd: Register

Brian, Chris, me (4) GW Software

dexter ... John, me (15) 1-Clients Re

Jody .. Lee, Abid (15) Contract/ Paym

Kristy, me (3) LSBA Four Co

Kristy Nunez LSBA Four Co

Kerri, me (2) LLC

Landon, me (2) lfo.audio -- Exe

Arthur&, me (5) Ayala trust

Bea, me (2) Ayala Family T

Eric Leininger Fwd: Re:

Mitchell Klein software licens

Arthur& Liz Ayala update Ayala T

Jody, Abid, Jody (5) 2-DanceDevelo

Shawn, me (2) A TechShow s

Roger, me (2) 1-Clients Sh

Ryan, me, Terrance (14) 1-Clients Int

Brian, me (2) Vending Health

Ryan, Brian, me (4) Re: Entities


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 - T B I U A -

Send

1-26 of 26

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 t.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

Chrome File Edit View History Bookmarks People Window Help

Inbox - abid@hussainlaw.com Hussain Law LLC - Calend

https://www.google.com/calendar/render?tab=oc#main_7

HUSSAIN LAW LLC

Search Calendar

+Abid

Calendar Today < > Apr 26 - May 2, 2015 Day Week Month 4 Days Agenda More

CREATE

April 2015

S M T W T F S

29 30 31 1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 1 2

3 4 5 6 7 8 9

My calendars

- Abid Hussain
- abid@hussainlaw.co...
- abid@PD
- Birthdays
- Charmaine Cooper H...
- Charmaine's Workout...
- Hussain Law - Firm C...
- PatentDive
- Simon's Class Sched...
- Simon's Extracurricul...
- Tasks

Other calendars

Sun 4/26

- Amex Bill Due on 3rd
- Pay Verizon Bill due on
- Lennie and Lisa's Anniv
- Pay Verizon Bill due

Mon 4/27

- Pay Cox Bill (charmaine)
- Last Relly Class of the
- Pay Cox Bill (Abid H)

Tue 4/28

- Joanne Giampietro's
- (jcavignac@couhigpa rners.com)
- 11:30 - 1p Lunch with Ed F. and his lawyer group
- 3p - 6p Pick up Simon Kumor
- 3:40p - 4:40p Kumor
- 4:30p - Teach WERQ at Relly
- 4p - Practice Panther I

Wed 4/29

- 1:30p - 2:30p SPX Sock Hop
- 6p - 9p Launch Fest D
- 6p - 8p Wednes at the Squan
- 6:30p - Weekly Stand

Thu 4/30

- 11 - 1p Kumon
- 2p - 3:30p Ron Cardenas - Ableton Session (rawrios@outlook.co m)
- 5p - 7p The Dupuy Annual Jaz Party (charmaine@gmail.co)
- 5p - 7p The Dupuy's Annual Jazz Fest Party
- 7p - 8p Teach WERQ
- 8:30p - Put out trash ar

Fri 5/1

- Pay Kumon
- Start on ConocoPhillips

Sat 5/2

- 11 - 1p Kumon
- 2p - 3:30p Ron Cardenas - Ableton Session (rawrios@outlook.co m)

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](#)

Actions + -

Google Drive

Chrome File Edit View History Bookmarks People Window Help

Inbox - abid@hussainlaw Google+ Forms - Google Drive

https://drive.google.com/drive/u/0/#folders/0B_g5DzlY7aDDajhSbHFSQjh0R3c/0B_g5DzlY7aDDSHdTSTRuSzkwQJk

HUSSAIN LAW LLC

Search Drive

+Abid

Drive My Drive > Law > Forms

NEW

My Drive

- DB-HL Share
- Issues with Box Syn
- Law
 - Administrative
 - Biz Dev
 - Entities
 - Forms
 - Research
- Nebulae
- Patentdive
- Personal
- Web

Shared with me

Recent

Starred

Trash

10 GB used (33%)
[Buy more storage](#)

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	—
NDAs 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/1zD8zfo3O7oIlqONpqs8lg36745MjnjkSR8N7qz1rZOM/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

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.

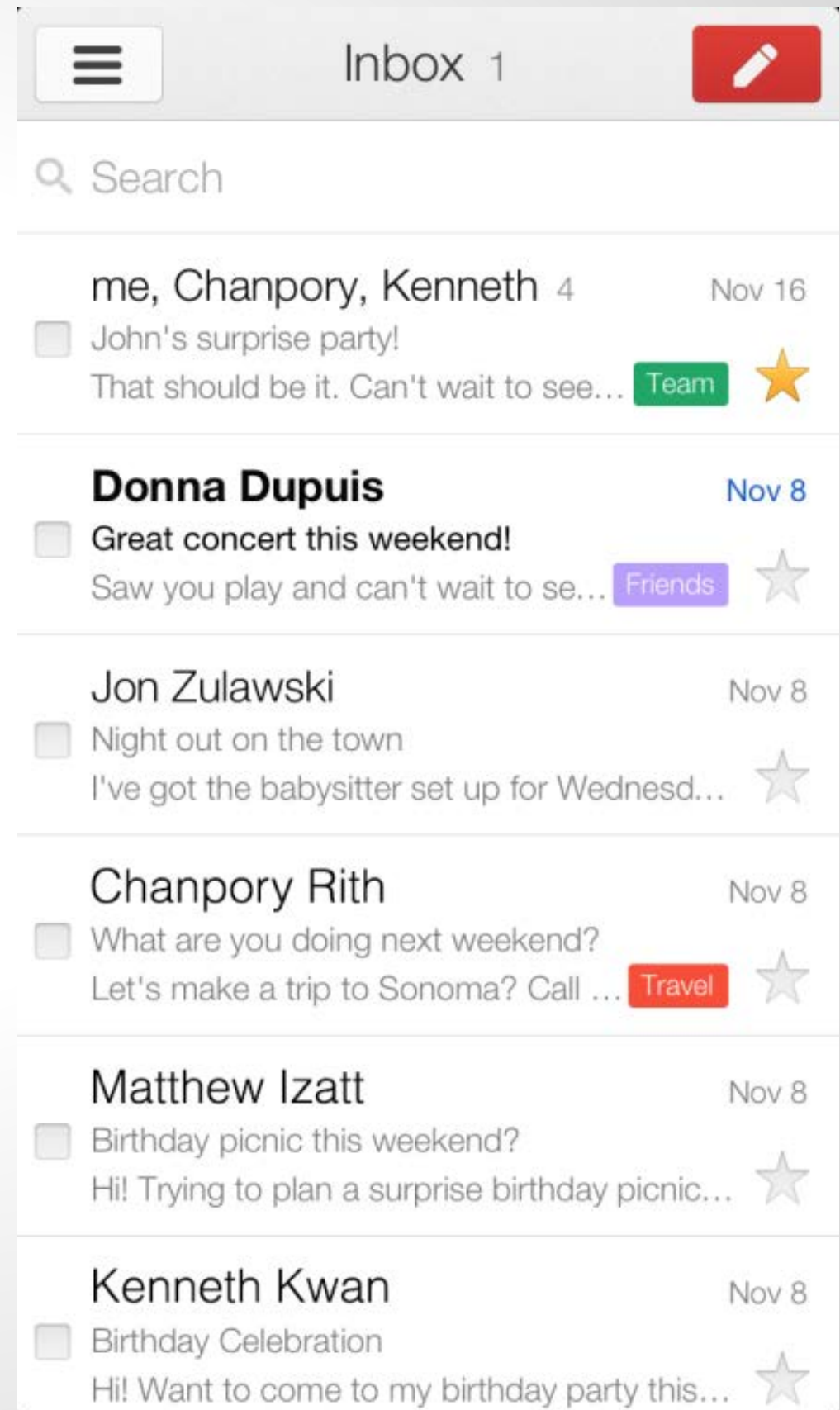
Upon motion duly made, seconded and carried, it was:

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

COMPANY AGREEMENT

Gmail App

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



Clio

Chrome File Edit View History Bookmarks People Window Help

favor - drycleaning - abid Hussain Law LLC - Calend Clio - 00389-Bogus

https://app.goclio.com/matters/1029990973

Hussain Law LLC Clio Apps ? Search your practice

Practice Calendar Tasks **Matters** Contacts Activities Bills Accounts Documents Communications Reports Sidebar

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's (more)	Abid Hussain 2.00	\$225.00	\$450.00
Start Timer Edit Delete					
<input type="checkbox"/>	04/26/2015	Drafted initial organizational resolutions based on interview with client.	Abid Hussain 1.00	\$225.00	\$225.00
Start Timer Edit Delete					
<input type="checkbox"/>	04/26/2015	Acquired EIN after interviewing client regarding tax matters and needs.	Abid Hussain 1.00	\$225.00	\$225.00
Start Timer Edit Delete					
<input type="checkbox"/>	04/26/2015	Filed formation documents with the Louisiana SOS.	Abid Hussain 1.00	\$225.00	\$225.00
Start Timer Edit Delete					
				5.00	\$1,125.00

April 2015

SU	MO	TU	WE	TH	FR	SA
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

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.com 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
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

Client Name

Billing Information

Name on Card

Name on Card

Email

Email

Billing Address

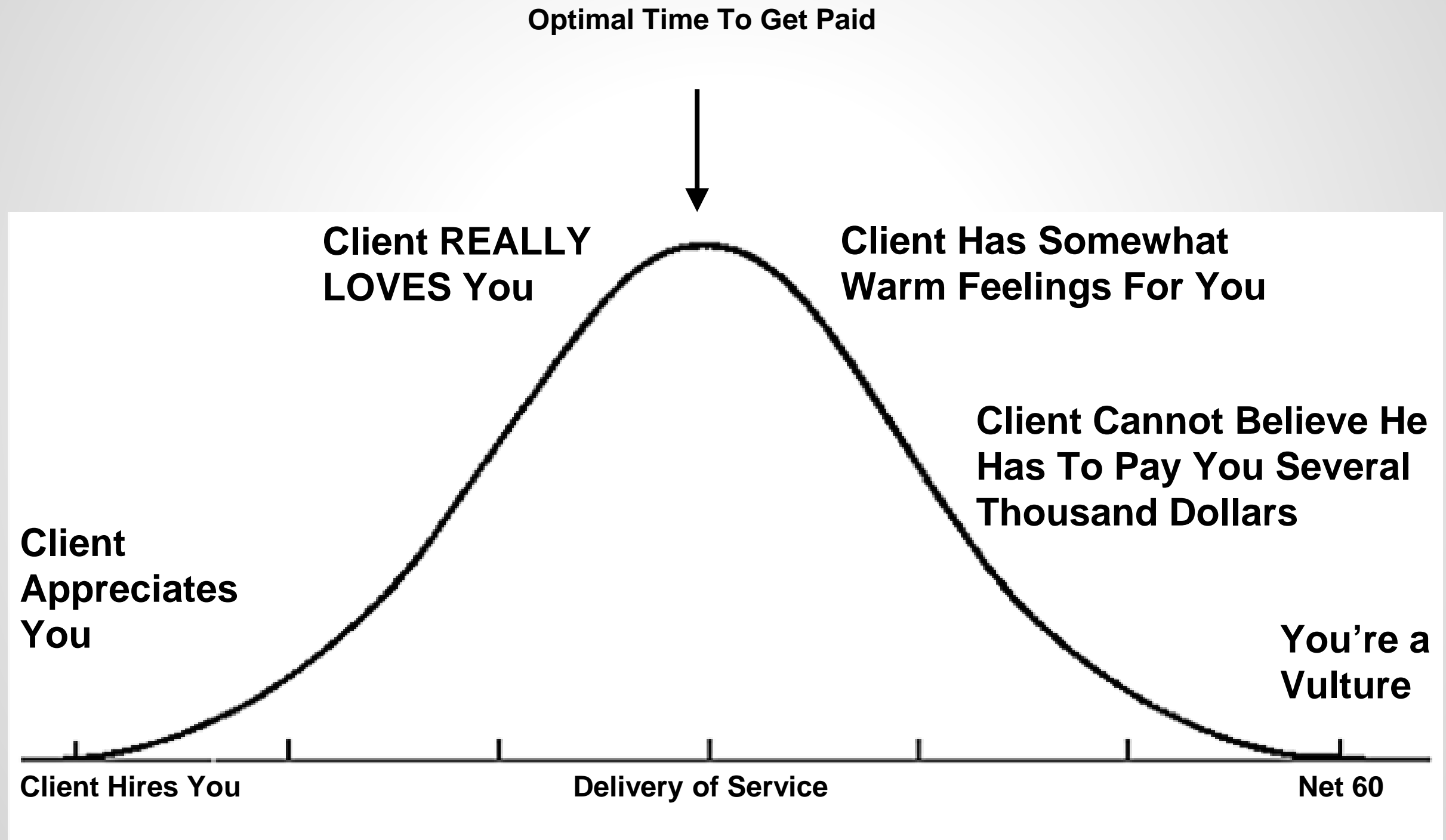
Billing Address

Billing Address 2

City Select State

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

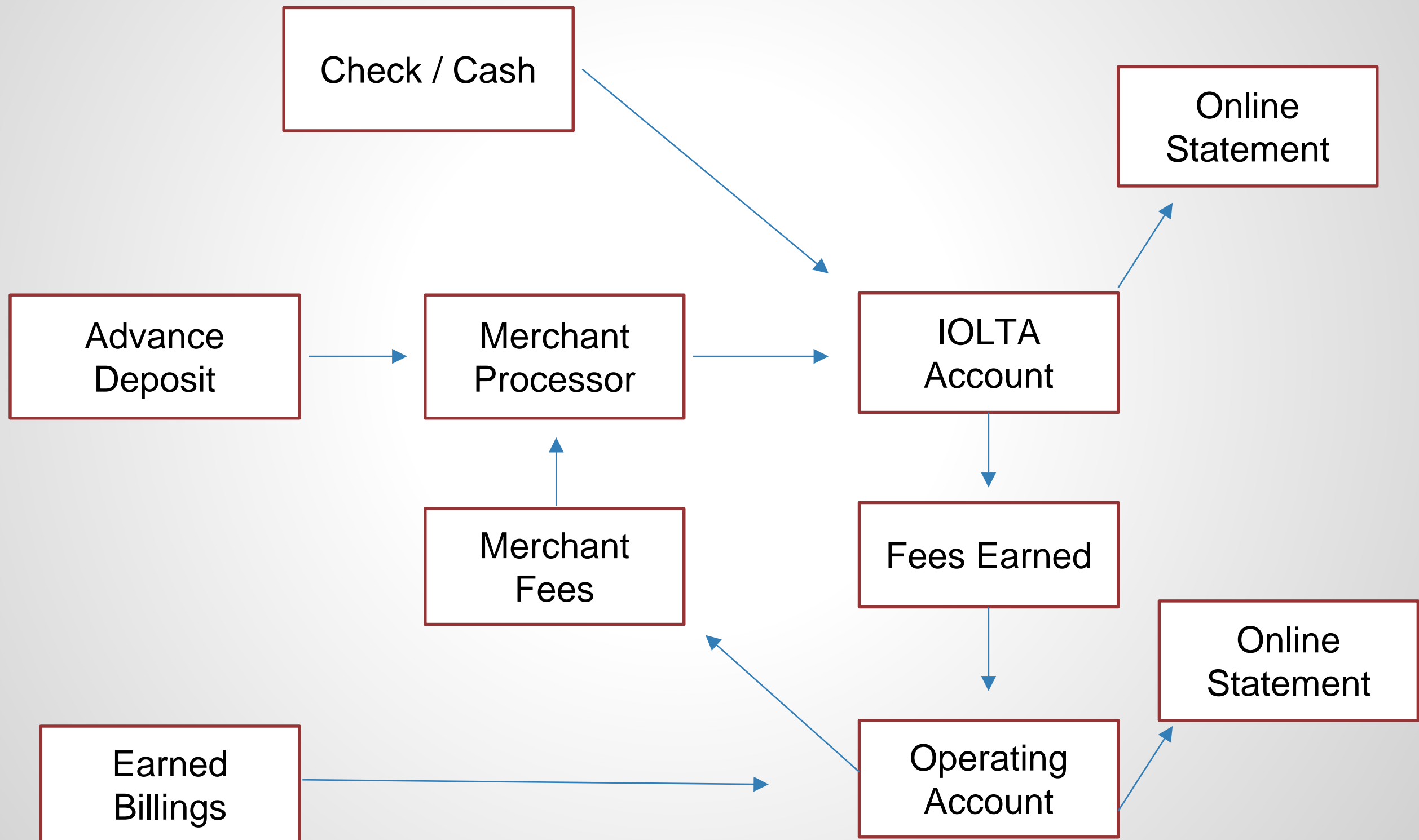
Foonberg's Client Appreciation Curve



Ethics

- More than 20 state bar associations have issued opinions stating that using the Cloud is ethical. See <https://abovethelaw.com/legal-innovation-center/2019/04/04/lawyers-and-cloud-computing-its-not-so-complicated-anymore/>
- 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


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
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

City

Select State

Zip / Postal Code

United States

Card Information

Card Number

CVV

Exp.

Month

Year

Submit Payment

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

07/28/2014

required

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 Owning	\$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



[Chase.com](#) | [Contact Us](#) | [Privacy Notice](#) | [En Español](#) |

[How can we help you today?](#)



LOG OFF

[My Accounts](#)

[Send Payments](#)

[Collect & Deposit](#)

[Transfer Funds](#)

[Investing](#)

[Customer Center](#)

CHASE ONLINESM Friday, October 28, 2016

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:

Transfer to:

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

Amount:

Memo:

Optional - 32 Maximum Character Limit

One-time or repeating?: ☒ One-time
☐ Repeating

Transfer date:



Next

Create A Paperless Trail

00428-Allman

CLIO CONNECT

NEW QUICK BILL

EDIT

MATTER ▾

General Corporate Counsel

Info

Not

Date

No R

Add Note

×

Subject

Date

11/03/2016

Note

Save

 or [Cancel](#)