

# Modern Law Firm Billing:

## Strategies That Actually Work



**Jordan Turk**

Attorney | Director of Education & Attorney Development,  
Smokeball

# Claim Your **FREE** Trust Accounting and Billing Software!

Smokeball Bill is **FREE** for all Louisiana State Bar Association Members.



Scan to get  
Smokeball Bill

or visit:

[www.smokeball.com/louisianabill](http://www.smokeball.com/louisianabill)

## Billing Dashboard

### Today's Billable



4.4 Hrs



2,600

### Last 7 Days Billable



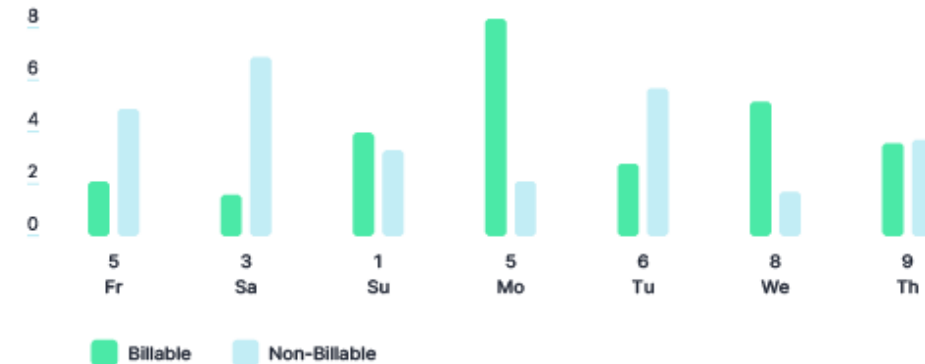
22.4 Hrs



11,200

### Billable/Non-Billable

Last 7 Days Till Today



### Recent Matters



William Holden  
Family



Louisiana  
State Bar  
Association

*Serving the Public. Serving the Profession.*



**Smokeball Bill helps law firms manage trust  
Accounting compliantly, bill easily & get paid faster.**



### **Trust Accounting**

3-way reconciliation to help you stay compliant.



### **Billing**

Time-based, flat fee, contingency, and more.



### **Time & Expense**

Track all matter-based time entries, fees and expenses.



### **Invoice Templates**

Professional, customizable invoice templates.



### **Accounts Receivable**

Know what's owed, overdue and paid



### **Payments**

Offer clients online payment options to get paid faster



# Jordan L. Turk

**Director of Education & Attorney  
Development, Smokeball**

- JD, University of Arkansas School of Law
- BA, The University of Texas at Austin
- Practicing Family Law Attorney in Texas
- Host, Hacking Law Firm Success



# The **#1** Legal Case Management Software for Law Firms

- Automatic time tracking - bill more accurately with a fraction of the effort
- Prebuilt workflows for specific practice areas
- Seamless integrations with Microsoft Word and Outlook
- Comes prebuilt with a library of 20k+ legal forms
- Identify business opportunities through powerful insights and reporting
- Enhance your output with the power of AI



# AGENDA

## 1. Introduction

1. Utilization & Realization Rates

## 2. Billing

- The Hourly Conundrum
- The Fee Agreement
- Authorization Form and Third-Party Payors
- Best Practices
- Automate It!

## 3. Collecting

- Invoice Follow-Up
- Aged A/R

## 4. Run the Right Reports

## 5. Live Demonstration!



Part 1

# Introduction

## PRODUCTIVITY

# This Is the Ideal Number of Hours to Work a Day, According to Decades of Science

An 8-hour workday only makes sense if you're screwing in widgets on an assembly line.

EXPERT OPINION BY JESSICA STILLMAN, CONTRIBUTOR, INC.COM @ENTRYLEVELREBEL

Decades of science and a whole host of historical luminaries have all come to the same conclusion: if your work involves your brain, then the right answer is just four hours.

**Source:** <https://www.inc.com/jessica-stillman/this-is-the-ideal-number-of-hours-to-work-a-day-ac.html>



“Charles Darwin worked for two 90-minute periods in the morning, then an hour later on; the mathematician Henri Poincaré from 10am till noon then 5pm till 7pm; the same approximate stretch features in the daily routines of Thomas Jefferson, Alice Munro, John le Carré and many more,” writes Burkeman.

First, formal research backs up Pang’s assertion. Have you heard of the 10,000 rule? You’d think the need for so much practice would run counter to the idea that four hours of intellectual work a day maxes out our brains. But according to Burkeman, when the same guys who conducted the research on which Malcolm Gladwell based his famous dictum studied the schedules of violinists, they found a hard limit on each practice session.

**Source:** <https://www.inc.com/jessica-stillman/this-is-the-ideal-number-of-hours-to-work-a-day-ac.html>

# Calculate Your Utilization Rate

# of Billable Hours Worked

÷

# of Hours Actually Worked



Multiple by 100 to get your percentage

Example: Billed 50 hours but worked 80 hours: **62.5% utilization rate**

The average lawyer has a utilization rate of **37%**! (That equates to 2.9 billable hours per average 8-hour workday)

Ideally, you want at least a 90% utilization rate

Run this calculation every month – reporting features can help here!

To get this rate, you need to be clocking when we start work for the day, and when you end it.

# Calculate Your Realization Rate

What you actually charged a client

÷

What you would've charged the client (no cuts/discount)



Multiply by 100 to get your percentage

Example: My rate is \$200/hr. I worked 10 hours on a case, but only invoiced the client for \$1500. **My realization rate is 75%.**

Run this calculation every month – reporting features can help here!

Good to monitor to see if you are cutting too much time or need to have a chat with an employee.



Part 2

# Billing

# The Hourly Conundrum

- **Make a billing glossary for your office, so that everything looks uniform across the board.**
  - **Example:**
    - Telephone conference with...
    - Review...
    - Evaluate...
    - Attend...
    - Draft...
    - Correspondence to...
- **So instead of an associate attorney writing “compose Motion to Compel” and a paralegal noting “write Notice of Hearing,” you get a more streamlined invoice**
- **Add value by not sounding secretarial**
  - The judge’s clerk is “Court”
  - OC’s paralegal is “Opposing Counsel’s office”
  - Runner is “Attorney Service”

# Entering Your Time

- Do not spend hours entering your time at the end of every month (you are trying to recreate your hours and you will inevitably miss billable time)
- Instead, enter your hours in real-time throughout the day
- If you do not have legal tech to help you, make a spreadsheet! I'm happy to send a copy of the Excel sheet on the right

	A	B	C	
1	Case	Description	Time	
2	Smith, Kaylee	Correspondence with client (multiple); review Request for Production; instructions to staff	0.75	
3	Wise, Samuel	Draft Final Decree of Divorce; telephone conference with client; correspondence to client	3.00	
4	Phillips, Warren	Mediation preparations; draft Mediation Memorandum; correspondence to Mediator; strategy conference	2.00	
5	Maxwell, Susie	Hearing on Motion to Compel; conference with client; telephone conference with opposing counsel	3.00	
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18		Total:	8.75	
19				
20				

# The Fee Agreement (Best Practices)

- Every single person who can bill on a case should be listed in the fee agreement, along with their hourly rate
- Have a mechanism built-in to the agreement that lets you up your rate (they should go up at least every year)
- Make sure the scope of the agreement is properly limited
- Explain the billing structure and when to expect invoices (i.e., monthly) at your initial client meeting

You agree to pay legal fees based upon the hourly rates of the Attorneys and paralegals who have rendered legal services. The hourly rates will be those in effect at the time the services are rendered. Please be advised that hourly rates are reassessed at the beginning of each year. You will be given 30 days' notice of any changes to the billing rates set forth below, with the same constituting an Addendum to this Fee Agreement. The hourly rate of each of the Firm's Attorneys and Paralegals as of the date of this Agreement is as follows:

### MINIMUM HOURLY BILLING RATES

**ATTORNEYS**

Downloaded from ascelibrary.org by University of California, San Diego on 06/01/15  
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DUAL BOARD-CERTIFIED PARALEGALS ARE BILLED AT \$[REDACTED] PER HOUR

BOARD-CERTIFIED PARALEGALS ARE BILLED AT [REDACTED] PER HOUR

PARALEGALS ARE BILLED AT \$ [REDACTED] PER HOUR.

LEGAL ASSISTANTS ARE BILLED AT \$ [REDACTED] PER HOUR.

The time expended on your matter will be computed on the basis of quarter-hour increments. If less than all of any quarter-hour increment is expended on your matter, you will be charged for the full quarter-hour increment. For example, if an Attorney should make a twenty-five minute telephone call on your case, you will be charged for two quarter-hour increments, even though only a fraction of the second increment was used.

# The Fee Agreement: Evergreen Retainers

- Evergreen retainers allow you to always be billing against money in trust, instead of trying to get it after the fact via invoice
- Requires the firm and all its billable hour employees to be on top of entering their time – MUST be done weekly for this to succeed
- Send out evergreen emails once a month (typically mid-month)
- To start utilizing it, input a provision into your fee agreement:

You agree to pay the Firm a Retainer of \$5,000.00. **This Retainer is not the cost of the case.** The Retainer is paid to the Firm to secure its services, to compensate the Firm for assuming responsibility for your case and to insure the Firm's availability to represent you. Should you so choose, Retainers may be paid with Visa, Discover, MasterCard or American Express.

If the amount of your Retainer should fall below forty percent of its original amount at any time, you agree to pay an additional Retainer in an amount sufficient to replenish the Retainer to its original amount and to continue to do so until the case is concluded.

\_\_\_\_\_ Client's Initials



# Improving Your Billing Processes

- Be practical and organized – clients should not be waiting months to receive an invoice
- Bill clients regularly, predictably, and as close to payday as possible
- Have the attorneys discuss billing and invoicing at the initial client consultation to put that on the client's radar and prevent future headaches
- Consider billing twice a month
- Use credit cards/online payments to your advantage, including adding a link to your signature block
- Make payment due upon receipt

# Billing Procedures

## Keep Things Consistent!

- The longer you wait to bill a client, the less likely they are to pay it
- Invoice entries should be clear, but not a novel
- Cut time as needed
  - (e.g., staff billed 1.0 to draft a Notice of Hearing that in reality takes .25 on a bad day)
- If you discount or give a credit to the client, make sure this is reflected on the invoice
  - (your software can help with this)
- Someday, you may be defending your bills in court
  - don't do things that would make a judge cringe



# Authorization Forms and Third Party Payor Addendums

- Try to get an authorization form when taking a client's credit card payment for a scheduled payment plan (CYA!)
- Have a fee agreement provide for **third party payments**, and attach a "Third-Party Payment Addendum" to your fee agreements

## THIRD PARTY ADDENDUM TO CLIENT FEE AGREEMENT

This Third Party Addendum to Client Fee Agreement (hereinafter "Addendum") to our Fee Agreement will memorialize a modification in the payment arrangement contained in said Fee Agreement. To the extent that this Addendum contradicts anything in our Fee Agreement, the terms contained in this Addendum shall control.

### CLIENT:

I, \_\_\_\_\_, acknowledge that the fee is being paid by THIRD PARTY PAYOR. I further acknowledge that payment by THIRD PARTY PAYOR does not create an attorney-client relationship between THIRD PARTY PAYOR and ATTORNEY, and ATTORNEY will not discuss the case with THIRD PARTY PAYOR unless expressly authorized by me below. I understand and agree that representation by ATTORNEY is contingent upon payment of all outstanding fees, even if initially assumed by THIRD PARTY PAYOR. Any portion of any retainer or cost payment refunded by ATTORNEY shall be refunded to THIRD PARTY PAYOR, unless THIRD PARTY PAYOR expressly advises ATTORNEY otherwise.

AGREED AND ACCEPTED, this \_\_\_\_ day of \_\_\_\_, 20\_\_.

\_\_\_\_\_  
XXXXXXX, CLIENT

\_\_\_\_\_  
XXXXXXX, ATTORNEY

### THIRD PARTY PAYOR:

I, \_\_\_\_\_, have read the foregoing language contained in this Addendum and have read the Fee Agreement, and in consideration of the services to be provided CLIENT by ATTORNEY, I hereby guarantee that the money to be paid under the Fee Agreement will be paid by me on behalf of CLIENT to ATTORNEY, if CLIENT does not pay per the terms relating to payment as set out in said contract. I understand and agree that my agreement to pay does not create an attorney-client relationship between me and ATTORNEY. ATTORNEY's responsibility will be to CLIENT and not to me, but I will ensure that all payments required by the Fee Agreement are made in a timely fashion.

I ACKNOWLEDGE THAT I HAVE READ THIS ADDENDUM, UNDERSTAND ITS PROVISIONS, AND AGREE TO BE BOUND BY THE PROVISIONS OF SAID ADDENDUM.

AGREED AND ACCEPTED, this \_\_\_\_ day of \_\_\_\_, 20\_\_.

# Automate It!

## Batch/Bulk Billing

Add New

Matters

Contacts

Calendar

Tasks

Time/Fees

Invoices

Accounts

Reports

Messages

Invoices

INVOICES

CREATE INVOICES

FINALIZE WITH PAYMENTS

BULK TRUST PAYMENT

REMINDERS

LIST

A-Z

Grouped by Client

SHOW

All unbilled matters

All with \$ 1000 unbilled

FOR ENTRIES DATED

All

This Month

Last Month

Before 04/17/24

From 04/01/24

To 04/30/24

BILLING TYPE

Show All

Time Based

Fixed

Contingency

CREATE (100)

☒

Client & Matter

☒

005VL0317 - 8 - Anderson - Employment Claim - Securities Unlimited - Open

☒

03-17-030 - Berry - Sell - Ellington - Closed

☒

034VL0317 - Lewandowski - Pre Decree - Lewandowski - Open

☒

04-17-038 - Stefani - Pre Decree - Rossdale - Closed

☒

1067-BB0121 - Richards - Buy - Grant - Open

☒

1094-BB0321 - Turnbull - DUI - Open

☒

1122-BB0321 - Johnson - Civil Dispute - Open

☒

1144-BB0421 - Thomas - Pre Decree - Thomas - Open

☒

1228-BB0921 - Ballard - Decedent's Estate - Open

☒

1248-BB1021 - Alex | ABC LLC - Buy - Kramer - Open

☒

1249-BB1021 - Appleseed - Personal Injury - Plaintiff - Allstate Insurance Company of Greater Southeastern

☒

1250-BB1021 - Simpson - Family General - Smith - Open

☒

1317-BB0322 - Goodman - Decedent's Estate - Open

☒

1331-BB0422 - Kramer - DUI - Open

☒

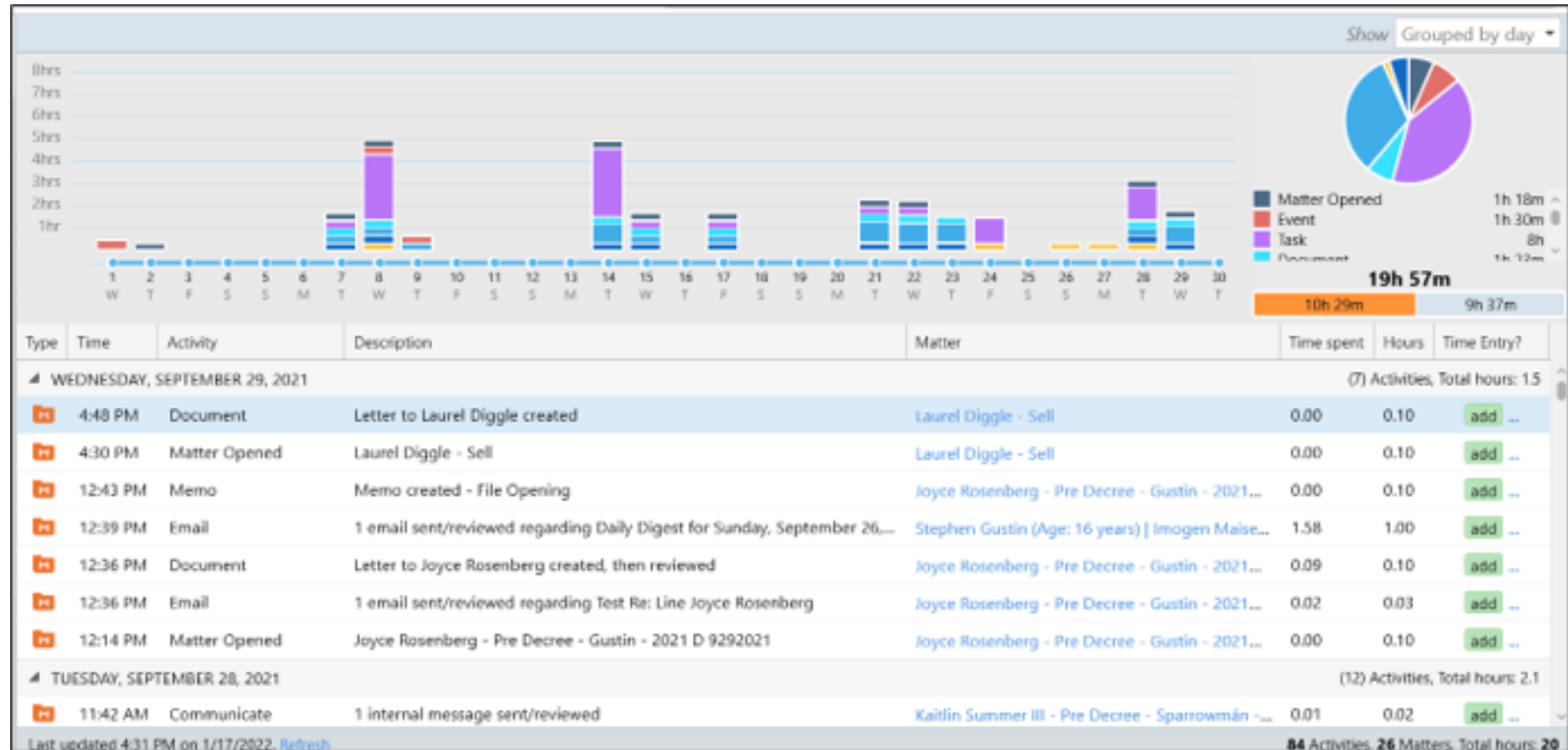
1383-BB0622 - can override - Rhine-Test | 2 - Estate Planning - Open

☒

1391-BB0622 - Doe - Civil Dispute - State Farm - Open

# Automate It!

AutoTime



# Automate It! (Ethics Edition)

## Protect Funds

**Protect Trust Funds**

**MATTER**  
747-BB1119 - Agrest - Pre Decree - Opened 11/20/2019

**CONTACT**  
Trent Adams & Jane Adams (\$24,300.00 available) ▼

**AVAILABLE FUNDS**  
\$ 24300.00

**PROTECTED FUNDS REASON**  
House proceeds

**AMOUNT**  
\$ 15000

Add new protected funds

**TOTAL AMOUNT**  
\$ 15000.00

**PROCESS**



Part 3

# Collecting

# Invoice Follow-Up

- Follow up with clients regarding their outstanding balances about a week after you send out your invoices – put this on your calendar!
- Rip off the band-aid. No one wants to contact clients about payment, but you don't work for free
- As the attorney, be prepared to defend your bills, and instruct everyone to send the client to you with questions (your paralegal should not be defending your billing entries with the client)
- Client hasn't paid their invoice? **Send them a Motion and Proposed Order for Withdrawal.** File if they do not make their account current.





- What is A/R?
- What is **AGED** A/R?
- Why is this important?

# Collecting on Aged A/R

1

## 120 days or more old:

- **Set time on your calendar** to address your aged A/R
- **Cull your list and separate clients** into two groups:
  1. Clients you believe can and will pay their balance
  2. Your “Hope and a Prayer” list
- **Determine the discount** you’d be willing to offer
  - To your “Hope and a Prayer” List
  - in exchange for their immediate payment
- **Reach out personally** as the attorney working the case
- **Be clear and concise** in your communications

# Collecting on Aged A/R

2

## Sample Email Copy:

The screenshot displays an email client window with a menu bar (File, Message, Insert, Options, Format Text, Review, Help) and a toolbar containing various icons for text formatting, alignment, and attachments. The email header shows a 'Send' button, 'To' and 'Cc' fields, and a subject line: 'Subject: To [Name] re Outstanding Invoice Update'. The email body contains the following text:

Hello [Client],

I hope you are well. My records show that you have an outstanding balance of **\$(10,000 - example)** due to the firm.

I have spoken with our billing department, and I was able to work out a deal for you:

If you remit payment of **\$(5,000.00 - example)** within the next five business days, the firm will forgive the remaining balance. However, if payment is not received within that timeframe, you will still owe the full amount (**\$(10,000.00)**). Please be advised that this opportunity will not be offered again.

If you have any questions about your bill, please do not hesitate to contact me. You can pay the **\$(5,000.00)** online by clicking the link below my signature.

Thank you,

**[Attorney's email signature]**

**[link to pay online]**

# Incentivize Your Associates

- If you were only the supervising attorney on the case (i.e., not the one working it day-to-day), consider providing an incentive to your associate and have them be the point of contact for your collections campaign
- For instance, have associate handle the aged AR for their assigned cases and offer them 25% or so of everything they collect on that aged AR list



## Words of Caution

This is a ONE-TIME deal; you  
shouldn't ever be offering this again.  
Only offer this to closed cases



Part 4

# **Run the Right Reports**

# Profitability Reporting

DASHBOARDS

MATTER

MATTER TYPE

FEE EARNER

Activities and fees recorded

between

6/1/2022

and

11/30/2022

☐ Show additional fee columns

RUN REPORT

FIRM INSIGHTS BY FEE EARNER / STAFF

Name	AT Time	AT Total	Staff Cost	Fees Entered	Estimated Profit	
William R Smith	3 hrs	\$1,200.00	\$216.35	\$0.00	(\$216.35)	
Rebecca Wonsover	0 hrs	\$0.00	\$0.00	\$525.00	\$120.41	
Mary Ellen Kelleher	4.5 hrs	\$1,800.00	\$324.52	\$160.00	(\$284.52)	
Ruchie Chadha	0 hrs	\$0.00	\$0.00	\$0.00	\$0.00	
Training Account	0.5 hrs	\$125.00	\$18.03	\$6,862.00	\$481.97	
Chad Holaway	1.68 hrs	\$372.50	\$60.70	\$50,598.34	\$8,214.30	
Sara P Hawes	0 hrs	\$0.00	\$0.00	\$0.00	\$0.00	
Javier Rodriguez-Martin	0.5 hrs	\$100.00	\$0.00	\$5,250.00	\$0.00	
Harrison Wells	0 hrs	\$0.00	\$0.00	\$200.00	\$0.00	
Jason Nevins	0 hrs	\$0.00	\$0.00	\$0.00	\$0.00	
Frank Toledo	0.15 hrs	\$15.00	\$0.00	\$610.00	\$610.00	
TOTALS	440.58 hrs	\$102,272.08	\$2,200.93	\$649,019.47	\$180,265.11	

# Run the Right Reports

Aged A/R should be one of your regular monthly (ideally weekly) reports

Run By

Matter

Attorney Responsible

(No Atty Resp),Aaron Zeitzman,Ale

Practice Area

(Not Assigned),Appeals,Business,C

Matter Status

(No S

Extend To:

> 120 Days Overdue

Originating Attorney

(No Orig Atty),Aaron Zeitzman,Ale

Matter Type

(Not Assigned),1031 Exchange,Adi

Include Interest

☐ Tru

<

1

of 32

>

↺

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100%

⏏

⏏

Find | Next

Aging Summary

By Matter

Internal Reference	Client	Matter Type	Matter Description	Atty Resp	Current	1 to 30 Days Overdue	31 to 60 Days Overdue	61 to 90 Days Overdue	91 - 120 Days Overdue	>120 Days Overdue	Total Unpaid
(L)					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,060.00	\$1,060.00
(L)					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,100.00	\$2,100.00
(L)					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,204.00	\$5,204.00
(L)					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,000.69	\$5,000.69
2023-000337SMKBL		Guardian ad Litem – Guardianship of a Minor			\$0.00	\$0.00	\$0.00	\$200.00	\$0.00	\$0.00	\$200.00
1383-BB0622 - can override	2, Client   Rhine-Test, Cathy	Estate Planning	TEST Description - Override and Create Your Own	CR	\$0.00	\$0.00	\$0.00	\$698.33	\$0.00	\$1,209.17	\$1,907.50
2023-000292	303 Taxi Corporation	Motor Vehicle Accident - Defendant			\$0.00	\$0.00	\$900.00	\$0.00	\$0.00	\$0.00	\$900.00
2023-000482SMKBL	Abbott, Georgina	Estate Planning	test	AZ	\$0.00	\$0.00	\$500.00	\$500.00	\$0.00	\$500.00	\$1,500.00
923-BB0920	ABC City	Sell - Commercial			\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,884.00	\$9,884.00
862-BB0520	ABC City	Civil Dispute	Boone 20CV06541	RC	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$27,213.33	\$27,213.33
620-BB0219	ABC City   1232 Land Trust	Property Damage Claim	ACB Property Damage Claim No. 00923183 ABC Vs. State Farm Ins.	BV	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,162.50	\$1,162.50
659VL-0518	ABC Constructions (Chicago)	Administration	Home care		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$770.00	\$770.00
1304-BB0222	ABC Constructions (Chicago)	Civil Dispute		EAP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
TABS number here	ABC County	Bankruptcy	Calvert District of Maryland Ch. 7 21-11111	KJ	\$167.46	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$167.46
ABC - 123 Main - L1	ABC Land Company	Buy - Commercial	ABC Land Company - 123 Main Street - Lease 1	CR	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,690.00	\$1,690.00
ABC - 123 Main - L3	ABC Land Company	Buy - Commercial		CR	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00
2023-000319	Abdallah, Vanessa	Pre Decree			\$1,477.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,477.00
2023-000262	Abdallah, Vanessa	Civil Dispute			\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$800.00	\$800.00



# Run the Right Reports

## Income Allocation

Payment Date From1/1/2024

Payment Date To4/17/2024

TimekeeperAaron Zeitzman,Alex Borosage,Ale

Run By<None>

Subtotal By<None>

Level of DetailMatter

Attorney Responsible(No Atty Resp),Aaron Zeitzman,Ale

Originating Attorney(No Orig Atty),Aaron Zeitzman,Ale

Save Filters as Firm Default?No

1 of 4

100%

Find | Next

Income Allocation - Details

Payments from 1/1/2024 to 4/17/2024

Internal Reference	Client	Matter Type	Matter Description	Atty Resp	Orig Atty	Tkpr	Expenses Collected	Fees Collected	Total Collected
005VL0317 - 8	Anderson, Lauren	Employment Claim	State Agency Charge No.: 392102	BS		CMR	\$0.00	\$932.00	\$932.00
005VL0317 - 8	Anderson, Lauren	Employment Claim	State Agency Charge No.: 392102	BS		EAP	\$145.00	\$0.00	\$145.00
030VL0317	Powers, Jake	Sell	1234 Harold, Chicago, IL 60601	CH		CH	\$0.00	\$500.00	\$500.00
10065.43729	Gilmour, David   Barrett, Syd	Construction Dispute		EAP	CR	EAP	\$0.00	\$500.00	\$500.00
1110-BB0321	ABC Homeowners Association of Maryland (Branch name is for internal tracking)	Debt Collection	Montgomery 0602-0012346-2021	EAP	EAP	SS	\$36.30	\$0.00	\$36.30
1143-BB0421	Archer, Allan	Civil Dispute		AS		EAP	\$467.00	\$860.00	\$1,327.00
1143-BB0421	Archer, Allan	Civil Dispute		AS		SS	\$0.00	\$748.24	\$748.24
1144-BB0421	Thomas, Michael	Pre Decree	Calcasieu Parish 2021-0065	WRS	JS	EAP	\$0.00	\$100.00	\$100.00
1149-BB0421	State Farm Insurance	Insurance Defense	State Farm Insurance, Claim No. 456465465	LT	LT	SS	\$100.00	\$0.00	\$100.00
1191-BB0821	Sandlerson, Franc	Personal Injury - Plaintiff		JKR		CMR	\$500.00	\$25,000.00	\$25,500.00
1236-BB0921	Johnsburg, Heinrich   Johnson, Johnny	Guardianship of a Disabled Person	Madison Hobbes Collier 743292			EAP	\$0.00	\$160.00	\$160.00
1248-BB1021	Alex, Jeff   ABC LLC   Alex, Jeff	Buy		BV		EAP	\$0.00	\$6,500.00	\$6,500.00
1248-BB1021	Alex, Jeff   ABC LLC   Alex, Jeff	Buy		BV		EC	\$0.00	\$0.00	\$0.00
1248-BB1021	Alex, Jeff   ABC LLC   Alex, Jeff	Buy		BV		SS	\$0.00	\$750.00	\$750.00
1298-BB0222	Always There Insurance   ABC Homeowners Association of Maryland	Property Damage Claim				EAP	\$609.00	\$1,450.00	\$2,059.00

# Run the Right Reports

## Trust Balances

**Remember you are a  
professional  
fiduciary of your  
clients' property!**

### Trust Balances Report

IOLTA  
as at 04/17/2024

Matter Reference	Matter Description	Matter Type	Client(s)
0000Test2 -111- BB0522		Post Decree	Rita Oxbury
005VL031 7 - 8	State Agency Charge No.: 392102	Employment Claim	Lauren Anna Anderson
1067- BB0121		Buy	Ian Richards
1110- BB0321	Montgomery 0602-0012346-2021	Debt Collection	ABC Homeowners Association of Maryland (Branch name is for internal tracking)
1114- BB0321		Workers' Compensation	Hugh Connelly
1143- BB0421		Civil Dispute	Allan Archer
114VL- 0917	Cook 2017-CR-8745	DUI	Jeff Bensch
1164- BB0521	For Settlement Webinar Cook 2019-CV-1928382   Incident Date: 12/20/2017   SOL Date: 12/20/2019	Personal Injury - Plaintiff	Anne Kensington   Kim Young

# Run the Right Reports

WIP (it into shape)

Report Period

Custom Range

Date From

4/1/2024

Date To

4/30/2024

Run By

<None>

Subtotal By

<None>

Included Columns

Date,Internal Reference,Client,Mat

Attorney Responsible

(No Atty Resp),Aaron Zeitzman,Ale

Originating Attorney

(No Orig Atty),Aaron Zeitzman,Ale

Timekeeper

Aaron Zeitzman,Alex Borosage,Ale

Client Search

Client

<All>

Entry Type

Tim

1 of 1

100%

Find | Next

Work in Progress - Details

All Unbilled Entries From: 4/1/2024 to 4/30/2024

For All Matters

Date	Internal Reference	Client	Matter Type	Tkpr	Subject / Description	Entry Type	Draft?	Billable ?	Write Off?	Hrs / Qty	Rate	Total
4/2/2024	005VL0317 - 8	Anderson, Lauren	Employment Claim	MUS	Test	Time	No	Yes	No	1.00	\$150.00	\$150.00
4/3/2024	TABS number here	ABC County	Bankruptcy	SS	Recording Fees for Lake County	Expense	No	Yes	No	1.00	\$29.37	\$29.37
4/4/2024	726-BB1019	Choi, Alice	Pre Decree	SS	test	Fixed	No	Yes	No	0.00	\$500.00	\$500.00
4/4/2024	2023-000471SMKBL	1232 Land Trust	QDRO Preparation	JT	test	Time	No	No	No	1.00	\$1.00	\$0.00
4/4/2024	2023-000471SMKBL	1232 Land Trust	QDRO Preparation	JT	test testkjkhjkhijkhjk	Time	No	Yes	Yes	1.00	\$1.00	\$1.00
4/4/2024	2023-000471SMKBL	1232 Land Trust	QDRO Preparation	JT	test	Expense	No	Yes	No	1.00	\$5.00	\$5.00
4/5/2024	739-BB1119	Craig's Chips	Buy - Commercial	CH	Smokeball reviewed	Time	No	Yes	No	0.70	\$200.00	\$140.00
4/9/2024	2022-000155	Sanders, Patrick	Post Decree	JT	Letter to Patrick Sanders created	Time	No	Yes	No	0.10	\$250.00	\$25.00
4/10/2024	2023-000476SMKBL	Fawcett, Yeseni	Workers' Compensation	PEO	test	Time	No	Yes	No	1.00	\$400.00	\$400.00
4/11/2024	Fifth Third	A corner barbershop	Business General	SS	1 email sent/reviewed regarding The audio transcript of cloud recording - Document Automation Deep Dive: Containers is now available	Time	No	Yes	No	0.20	\$200.00	\$40.00



Part 5

# **Live Demonstration!**

# Claim Your **FREE** Trust Accounting and Billing Software!

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## Billing Dashboard

### Today's Billable



4.4 Hrs



2,600

### Last 7 Days Billable



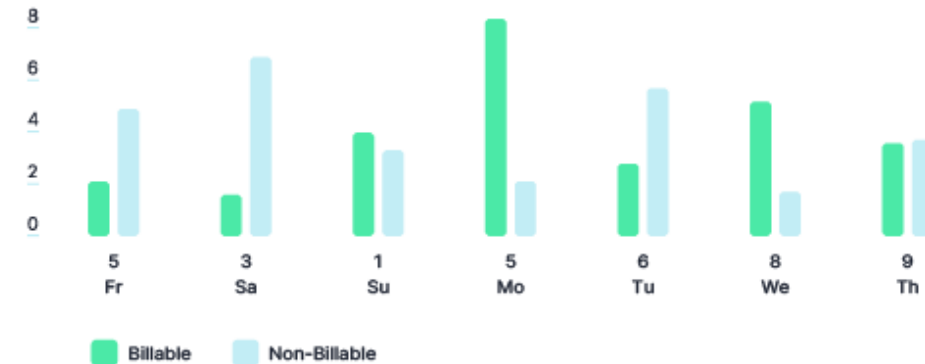
22.4 Hrs



11,200

### Billable/Non-Billable

Last 7 Days Till Today



### Recent Matters



William Holden  
Family



Louisiana  
State Bar  
Association

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# The **#1** Legal Case Management Software for Law Firms

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- Identify business opportunities through powerful insights and reporting
- Enhance your output with the power of AI



A large, solid orange circle is centered on a white background. Inside the circle, the word "Questions?" is written in a white, bold, sans-serif font.

**Questions?**

# Thanks for joining!



**Jordan Turk**

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Advisor at Smokeball

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