Client Accounting: Enhance Your Efficiency and Automate Your Compliance

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A client fund request asks a client to deposit funds in trust before you start working on a case or matter. The funds for future legal services or future disbursements that have not yet been billed to the client need to be deposited immediately into a client account. Sounds simple, right? Unfortunately, client accounting mistakes can lead to ethics violations and even disbarment.

You need trustworthy software that's part of your secure practice management operations. Trust Clio — the world's leading cloud-based, legal practice management software — to optimise your workflow and automate how you send and receive client payments.

Client billing and collections are better when managed with Clio.

Enhance your efficiency.

Client fund requests are time-consuming and can be finicky to complete. They take valuable time out of your day, yet without them, you shouldn't start work. In addition, failure to manage these funds accurately can lead to ethical issues of non-compliance with your local trust accounting rules.

With Clio's new functionality, that securely handles client fund requests, users can effortlessly automate this cumbersome process and dramatically reduce potential entry and collection errors. Client payment requests are sent directly from Clio. Users are able to create new requests inside a matter or directly at the client level.

Automatic Compliance.

Client account reporting has never been easier. With Clio, you can not only eliminate the manual entry of the transactions, but also simply filter, search, and identify your trust accounts. Clio's built-in client account ledgers track deposits and disbursements to create on-demand reports to keep your accounts accurate. All good things when you're looking to keep your firm compliant and protect your client's information.

We're ecstatic to finally announce this exciting new feature. For detailed instructions on how to use Client Fund Requests in Clio, please read the article on our Support site. This includes details on how to localise "Trust Requests" to "Client Fund Requests".

If you're looking for a client accounting solution, then look no further than Clio.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.