

**I am so glad you enjoyed my recent presentation and I hope I gave you some good nuggets to be able to take back to your law firm and implement to become more profitable. Attached is the first of the three things you requested I send you, the Credit Card Authorization form. Remember, you will have to make the changes that are appropriate for your firm. Are you comfortable charging their credit card the day you issue an invoice or would you like to give them 3, 5 or 10 days to dispute the bill? Things you need to change are highlighted to make sure you don’t forget to change something.**

**Here is the suggested language for your fee agreement:**

*Client agrees to provide Firm a retainer in the amount of $XXXX.XX before any obligation to perform work exists. This retainer will be held in trust by Firm. Client agrees that Firm may charge the credit card on file on the 10th of the month to pay that month’s bill or to replenish the retainer.  If Client fails to pay a monthly bill for services performed by Firm by the 10th of the month, the retainer will be applied to any outstanding balance for that month without prior approval from Client. In that event, Client agrees to immediately deliver sufficient funds to the Firm to replenish the retainer to a $XXXX.XX balance. If the balance is not replenished within 30 days, work on the case will be halted.  Once this representation is concluded and all outstanding bills have been paid, any remaining funds in the trust account will be returned to Client.*

**Again, I hope you enjoyed the presentation and if you have any questions or would like to book time with me, simply** [**click here**](https://www.timetrade.com/book/H8DNR+) **and schedule a free 30 minute Strategy Session.**

**Thank you,**

**Brooke**

**Brooke Lively, CFA, MBA**

**Director, Chief Financial Officer Services**

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