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Sample Billing Procedure

Legal billing is processed through Clio, an online service.

Each lawyer tracks her hours with a description of work performed, as well as expenses per Client and either enters it into Clio herself or emails this information to an assistant. All time tracking entries or emails, as applicable, are created just after the work is performed. Putting it off until later is a mistake to avoid because the time may either be over or underestimated depending on the lawyer's good or bad memory of doing the work.

The lawyer, or assistant if you are lucky enough to have one, logs the time and expenses received from the lawyer with the appropriate Client within Clio. If the assistant is handling, a copy of the lawyer's email to the assistant is attached to the draft bill and later filed.

At the end of each calendar month, the lawyer, or assistant, creates a draft invoice for each Client, prints it out, attaches the printouts of the time tracking and expense emails, and if the assistant is creating the drafts, he submits the drafts and documentation to the lawyer for approval. The lawyer corrects any description or time errors on the draft bill and approves them before submitting them back to the assistant.

Once completed and/or approved, each invoice is marked as approved in Clio and printed out to be submitted to the client via mail or the invoice is emailed to the Client.

If the Client has a current trust balance it will be applied to the outstanding amount on the bill and submitted to the accountant, if you are lucky enough to have one, as part of a monthly trust payout.