

Final article in a series about technology & tax law practice published by Richard Sam Lehman, Esq.

As technology is advancing, the tax law practice must keep up with these technological and societal changes, explains Richard S. Lehman in an article series.

BOCA RATON, FLORIDA, UNITED STATES, November 8, 2018 /EINPresswire.com/ -- In a final published article in a series, Florida tax attorney [Richard Sam Lehman](#) discusses the advancements and impact of technology upon the tax practice, and how it is being utilized to enhance the client experience in terms of satisfaction and customer service. As technology reshapes all of modern personal and professional life, the tax law practice is no exception.



The complete articles will be published on the blog of [Richard Lehman](#) at <https://richardlehmanblog.blogspot.com/>

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Harnessing technology can greatly increase client satisfaction, save time and effort, and reduce the stress of practicing tax law in this fast-moving world.”

Richard Sam Lehman, Tax Lawyer in Florida

Incorporating technology into a law practice can make the practice more efficient and increase client satisfaction. In fact, technology may enable the practitioner to exceed client expectations. Here are a few, simple-to-implement options.

Payment Services-Electronic Invoices

Payment by check is gradually becoming a thing of the past. Credit Card Payments are now commonplace, and even other forms of payment such as ACH, wire transfers, and Paypal are becoming more commonplace. While there

are costs associated with taking credit card payments or Paypal, the ease of use and the increased speed of getting paid are often worth the fees. Many merchant account vendors now provide a Web portal to facilitate online payments. Google and Square (www.squareup.com) as well as Legal Software Systems (www.legalsoftwaresystems.com) provide technology to accept payments via smartphone.

There are ethics opinions regarding Attorneys accepting credit cards for payments, thus one should consult the local ethics rules.

Confidentiality Protections

Maintaining the confidentiality of client information is an ethical foundation of the profession. Encryption tools may add extra security to electronic communications. Document efforts to keep their clients' information safe and secure.

Signing Documents Electronically

Services like DocuSign (www.docuSign.com), RightSignature (www.rightsignature.com) and e-Sign Live (www.esignlive.com) can save time and effort in cases where no wet signature is required and an electronic signature is sufficient.

On-line Calendaring and Scheduling

Scheduling meetings can be an enormous drag upon staff time and efficiency. This may cause delays and confusion, especially when the client or lawyer must re-schedule a previously scheduled meeting.

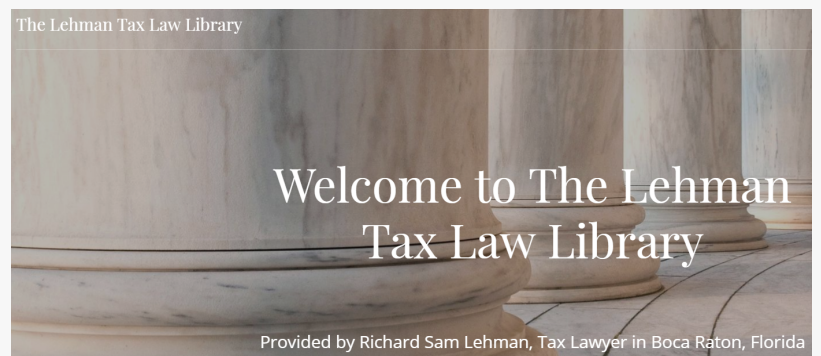
There are several options for simplifying scheduling. One of them is TimeTap (www.timetap.com). For example, potential clients can instantly schedule an appointment online. It also removes impediments from new clients to make contact with one's Firm.

Online scheduling and appointment booking products such as TimeTap synchronize with your Outlook or Google calendar and display your free and busy times to your clients and prospects.

Then, by simply clicking on a button from your Web site or using a secure portal, they can select one of your free times and can directly set up an appointment. Time Tap offers the ability to send out automated appointment reminders, and lets one reschedule and automatically send the rescheduling information. This added efficiency and flexibility means fewer demands on their overcrowded schedules. These services will contribute to improved quality, convenience and affordability.

Example of Technology Suite for a Small Law Firm

In case you wonder what technologies other law firms have, here is an actual real life example.



The Lehman Tax Law Library Website



richard lehman tax video fatca



New IRS Amnesty, FATCA & FFI Reporting

Richard S Lehman, Video on IRS Amnesty FATCA and FFI Reporting on Youtube



Richard S. Lehman, U.S. Tax Attorney

This small law firm uses the following technologies:

- CosmoLex (online and App) – Law Practice Management Software
- LawPay (online and App) – Payment software for billing/invoicing.
- Google Suite (online and App) – Document creation/management.
- Dropbox (online and App) – Transfer/management of large files.
- Westlaw – Legal Research.
- Skype – Phones & video conferencing.
- Facetime – Client communications.



Office, Richard S. Lehman, U.S. Tax Attorney

And since many law firms are gradually going “paperless,” a system for scanning documents and managing electronic files becomes indispensable.

Conclusion

Harnessing technology can greatly increase client satisfaction, save time and effort, and reduce the stress of practicing law in this fast-moving world. Undoubtedly, technology will continue to change the ways that legal teams serve their clients. The professional advice is to take it step-by-step: evaluate where is the greatest need in your office. Cooperating on documents? Scheduling appointments with clients? Making payments easier for clients? Then develop a strategy for best addressing those needs by implementing one of the numerous technological options and integrating it into the workflow of the office.

*NOTE: The inclusion of a technology or app in this article does not mean an endorsement or approval. The listed technologies are just for illustrative purposes. None of these particular technologies are endorsed or recommended by this author.

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About Richard Sam Lehman

[Richard S. Lehman](#) has established a sophisticated private practice focusing on tax law. His background, education, and experience has distinguished him in this complex field. A published author and noted speaker, Mr. Lehman has carved a reputation as a powerful client advocate.

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