



Danilson Law

reduces time,
agony, and
mistakes with

TrustBooks

CASE STUDY

Based in the state of Iowa, Danilson Law, PLC has assisted hundreds of buyers and sellers in real estate transactions since opening their doors in 2015.

Although it had grown quickly since its foundation, Jeremy Danilson, the founding member of Danilson Law, knew it needed to fix some of the more tedious processes of owning a law firm, including monthly reconciliations of the trust accounts.

Like many other small law firms starting out, Danilson Law used multiple spreadsheets to balance monthly reconciliations of the trust accounts.

Before TrustBooks, my monthly reconciliations were agonizing as I balanced accounts, used multiple spreadsheets, and numerous bank statements. That agony is gone.

Jeremy Danilson
Danilson Law, PLC



NEEDING AN ERROR-FREE PROCESS

Knowing that conducting monthly reconciliations by hand is prone to numerous errors, Jeremy Danilson looked for a solution that would help him avoid any penalties or disbarment from a random audit.

"Unannounced trust accounting audits can happen at any time. If my trust accounts are filled with errors, the ramification can be quite serious. To the point that I lose my bar license," explains Jeremy.

The main challenge most law firms face when performing monthly reconciliations is locating the errors when the numbers don't reconcile correctly. For Danilson Law, this process took hours every month looking through client trust accounts, trust ledgers, bank statements, checks, and spreadsheets.

They needed a solution that would keep them error-free without spending the hours reconciling by hand.

Using spreadsheets, it was a painstaking process of trying to locate where errors originated when performing my monthly reconciliations. It isn't easy nor perfect. However, using TrustBooks, my trust accounting is essentially error- and stress-free.

Jeremy Danilson
Danilson Law, PLC



MOVING TO A SIMPLIFIED SOLUTION

Having used TrustBooks for nearly two years, Jeremy explains that he is virtually free of errors in his monthly reconciliations. As he says, "I have had maybe two errors in the last two years in my trust accounts, and even then, TrustBooks makes it very obvious when I make a mistake."

Finding, showing, and explaining how to fix errors in trust accounts is now performed very simply and quickly during monthly reconciliations.

"There's nothing like this product in the market. TrustBooks takes care of my trust accounting so easily that I have not had to look for another solution," explains Jeremy.

Rather than spending time performing manual reconciliations and locating any errors in the trust accounts, Danilson Law can focus on serving real estate buyers and sellers without the fear of an unannounced trust accounting audit.

I went from spending 4 hours every month combing through and balancing spreadsheets, trust ledgers, checks, and bank statements to just 4 minutes a month using TrustBooks.

Jeremy Danilson
Danilson Law, PLC

Simplify your trust accounting

Trust accounting software for small law firms

THE SECURITY YOU NEED AT THE PRICE YOU WANT

- ✓ Ensure compliance with your state bar
- ✓ Easily, confidently manage your trust account
- ✓ Automatically generate the reports you need

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