

Clio Client Portal Guide

At Hassan & Hassan LLP, we are committed to providing you with a seamless, secure, and transparent experience throughout your real estate transaction. To help achieve this, our firm uses Clio, a leading legal practice management platform that includes a secure Client Portal.

What is the Clio Client Portal?

The Clio Client Portal is a highly secure, web-based platform where we can safely collaborate and share information regarding your file. Designed with bank-grade security, it ensures that your sensitive legal documents, identification, and communications are fully protected against unauthorized access.

- **Secure Document Sharing:** We will upload important documents, reporting letters, and forms for you to review, download, or digitally sign. You can also use the portal to securely upload required documents (such as insurance binders or void cheques) directly to our team.
- **Centralized Updates:** Secure messaging through the portal ensures that important updates are kept safe and organized in one place, avoiding the clutter of standard email inboxes.
- **Financial Transparency:** You can view trust account ledgers, statements of adjustments, and invoices securely online.

Flexible Communication Channels

While we use the Clio Portal as our primary hub for sharing formal documents and ensuring data security, **you are not restricted to using only the portal to reach us.**

We understand the importance of accessibility. You are always welcome to communicate with our team using whichever method is most convenient for you, including:

- Phone Calls
- Text Messages (SMS)
- Email
- Third-Party Apps (such as WhatsApp or WeChat)

Note: If you send us a critical document via text, WhatsApp, or WeChat, our team will securely transfer it to your Clio file to ensure it is properly saved to your permanent legal record.

Getting Started

Activating your portal account is quick and easy. When we are ready to share your first document, here is what you can expect:

1. Watch your inbox: You will receive an email invitation from our firm (sent via Clio).
2. Click the secure link: Follow the link provided in the email to access the portal and set up your password.
3. Optional App Download: Once your account is set up, search for “**Clio for Clients**” in your device’s app store to log in from your mobile device at anytime anywhere.

If you have any trouble accessing the portal or have questions about how to use it, please do not hesitate to contact our office. We are here to help!



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