What Law Firms Are Looking For

Law firms evaluate banking partners on compliance track record, security, and whether the bank understands the ethical obligations attached to client funds. These are the most common needs your law firm prospects will voice.

Seamless Compliance

State bar rules govern how client funds must be held and reported. Firms need a platform built around those obligations.

Client Fund Security

Misappropriation is a disbarment-level offense. Named subaccounts and a full transaction log protect the attorney as much as the client.

Transparent Reporting

Client-matter-level statements ready for bar audits or client requests without filing a request with the bank first.

IOLTA Administration

Interest swept to the state bar automatically, per state requirements. No manual intervention required.

Digital Access

Attorneys need bank-backed access to account data and fund movement from anywhere, not just from the branch.

Interest and Fund Management in One Place

Both CTA and IOLTA/IOLA funds configured to state requirements without manual intervention.

Transaction Tracking

Every deposit, disbursement, and interest payment attributable to a specific client matter.

Scales With the Firm

Works for a boutique with 10 matters and a mid-size firm with 500 — same compliance standards, same platform.

Wire and Same-Day Money Movement

Closings and disbursements are time-sensitive. Firms need wire availability and same-day fund movement.

Frequently Asked Questions

Does this replace our existing bank relationship?
No. Your deposits stay at your institution. ZEscrow adds a subaccounting layer on top of your existing funds, but your operating account structure doesn't change.

I'll need buy-in from the managing partner.
ZSuite can join that conversation with a demo tailored to the firm's practice areas and compliance obligations.

Will it work with our bank's core system?
ZEscrow integrates with the most widely used core systems. Your bank can confirm compatibility.

Does it support my state's bar requirements for attorney trust accounts?
Yes. Interest allocation and record keeping are configurable to state and local requirements, including states with specific IOLTA/IOLA rules.

I already track this in Clio / MyCase.
Legal software manages the matter — ZEscrow manages the bank-connected subaccounting those platforms can't replicate. No duplicate entry when workflows are set up correctly.

I can't commingle funds in a subaccounting system.
Commingling means mixing client funds with firm operating funds. ZEscrow keeps every matter in its own named subaccount — the IRS and FDIC treat each as distinct.