

# LEXO

## Simplifying Client Onboarding

Say goodbye to manual intake, phone calls and paperwork. Lexo automates intake, keeping you organized and focused on what's important your clients!

✉ info@lexo.ai ☎ 800-658-4050



## The Lexo Advantage



### Tailored Forms

Custom Retainer agreements & Fintrac consent forms tailored to your firm, pricing, and clients.



### Seamless Process

No logins required; In App electronic signing of documentation. Clients upload documents & file information directly.



### Auto Follow-Ups

No more chasing outstanding intake forms, or client documents and information



### Hands-Free

Lexo runs in the background with built in client reminders and updates, so you can stay focused on clients.

## How It Works

### Intake

- ✓ End-to-End Client Intake
- ✓ Retainer's / Fintrac Consent form
- ✓ Multi-Client Functionality
- ✓ Integrations with Treefort (IDV)
- ✓ Firm Customization & Branding

## We Support the Following Areas

- ✓ Real Estate
- ✓ Corporate Law

### Coming Soon!

- ✓ Wills & Estates
- ✓ Family Law
- ✓ Immigration

“ Everything just runs so smoothly. We send out the intake, and it's back with all of the documents sometimes within minutes. ”