

# About Clio

## The Company

Clio is the most comprehensive cloud-based practice management platform for the legal industry.

Produced with the cooperation and advice of Bar Associations and Law Societies worldwide, Clio is cloud-based, mobile-friendly, and built specifically for the legal profession. It delivers all the tools modern law firms need to run a successful practice: calendaring, time tracking, note-taking, document management, task management, legal accounting, bookkeeping, and billing.

Through the power of cloud computing, Clio eases the process of time tracking, billing, administration, and collaboration for law firms of all sizes. Clio also integrates seamlessly with other popular applications such as Google Apps and Dropbox.

As more and more legal professionals use Clio to save time and work more efficiently, Clio continues to evolve and innovate using digital technology to help update and improve legal practices, saving thousands of lawyers millions of hours around the globe.

Headquartered in Vancouver, Canada, Clio employs over 120 employees and has opened offices in Toronto, Canada and Dublin, Ireland.

Founded in 2007 by Jack Newton and Rian Gauvreau, Clio has raised \$27 million from investors including Bessemer Venture Partners. Learn more at [clio.com](http://clio.com).

## Clio's Founders

Clio was founded by Jack Newton and Rian Gauvreau. Jack and Rian are childhood friends who met at elementary school in Edmonton, Alberta. The pair became fast friends and had dreams of starting their own business.

In 2007, that dream took flight when Jack and Rian started to develop Clio. Combining Jack's background as a software programmer and Rian's experience managing IT infrastructure with a large national law firm, the idea was to rethink the way lawyers manage their practice. Using cloud computing and smart UI design, Clio took a completely new approach to legal practice management.

Jack and Rian have worked tirelessly to evolve Clio into the product it is today: a leading cloud-based practice management solution used by thousands of lawyers in dozens of countries around the globe.

## Clio Customers

Clio primarily serves the needs of solo practice and small-to-medium sized law firms focused on leadership, growth, and innovation.

Thousands of legal professionals in more than 50 countries use Clio's platform-as-a-service solution to manage their practice.

Clio empowers today's legal professionals to take control of their time. In fact, results from a survey conducted with approximately 3,500 Clio customers in September of 2013 revealed that, on average, Clio saves them up to 8.5 hours per week in administrative and billing time. These time savings can be invested back into the business of the firm—from doing more billable work for clients to attracting new clients—or into personal matters, such as time with the family and other personal pursuits. Customers refer to this saved time as the #Clioday, and have remarked that it is one of the most invaluable benefits of using Clio as their practice management solution.

# Key People at Clio

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**Jack Newton**  
**CEO and Co-founder**

An entrepreneur with vision and initiative, Jack leads Clio's charge to deliver results in every respect. He has also spearheaded efforts to educate the legal community on the security, ethics, and privacy related issues surrounding cloud computing, and has become a nationally recognized writer and speaker on these topics.

For his success with Clio, Jack has been named a 2014 Finalist for one of Ernst & Young's prestigious Entrepreneur of the Year awards.



**Rian Gauvreau**  
**COO and Co-founder**

An entrepreneur experienced in the realms of technology and legal services, Rian heads up operations at Clio. He is responsible for ensuring daily operations at the company, maintaining high standards of customer service and support, and securing a highly engaged and progress-minded workforce focused on delivering successful solutions to Clio's customers.



**Robert Froment**  
**Chief Financial Officer**

Robert Froment is a Chartered Accountant with over 20 years of experience in managing domestic and international financial operations, leading and advising corporations beyond the numbers toward practical solutions. As Clio's Chief Financial Officer, Rob is responsible for securing Clio's financial well-being and ensuring healthy and sustained growth.



**Steven Silberbach**  
**Vice President, Global Sales**

A highly accomplished sales executive, Steven drives Clio's sales team to deliver solutions that empower legal professionals to make wise investments in managing their firms. A former executive at Salesforce, Steven has a deep understanding of the value that cloud and software-as-a-service technologies offer today's businesses.



**Neil Shankman**  
**Vice President, Marketing**

Neil heads up Clio's marketing team, leading the brand's charge forward and connecting legal professionals with Clio's practice management solution. A former executive at Google and entrepreneur with an academic and legal background, Neil has a deep understanding of technology, business, and law.



**George Psiharlis**  
**Vice President, Business Development & Partnerships**

Guiding Clio's business development team to cultivate new opportunities through partnerships, George works with Law Schools, Bar Associations, and other partners across North America to make Clio and information on cloud computing increasingly accessible to law firms. George holds an MBA in Strategic Management, and originally joined Clio as its first management hire.



**Joshua Lenon**  
**Lawyer-in-Residence**

An attorney admitted to the New York Bar, Joshua Lenon is the Lawyer-in-Residence at Clio. As a Clio brand advocate and lawyer deeply infused in the business and technology of legal practice, Joshua brings legal scholarship to the conversations happening both within Clio and with its customers.

## About the Clio Cloud Conference

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In September, Clio hosts a two-day user conference where the best and brightest legal minds converge to discuss technology and the future of law. Known as the Clio Cloud Conference, the event is held in Chicago and attracts legal professionals from every corner of the United States as well as from Canada and overseas.

This year's event is being held on Monday, September 22 and Tuesday, September 23.

The conference attracts Clio customers and advocates, including lawyers, paralegals, administrators, and consultants as well as Clio's partners from Bar Associations, technology, business, education, and media.

## Keynote Speakers

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**Richard Susskind**  
**Author of "Tomorrow's Lawyers"**

Professor Richard Susskind OBE is an author, speaker, and independent adviser to major professional firms and to national governments. His main area of expertise is the future of professional service and, in particular, the way in which IT and the Internet are changing the way lawyers work. He has worked on legal technology for over 30 years. He lectures internationally, and has written many books and advised on numerous government inquiries.



**Cindy Cohn**  
**Legal Director for the Electronic Frontier Foundation**

Cindy Cohn is the Legal Director for the Electronic Frontier Foundation as well as its General Counsel. She is responsible for overseeing the EFF's overall legal strategy and supervising EFF's 14 staff attorneys. The National Law Journal named Ms. Cohn one of the 100 most influential lawyers in America in 2013, noting: "If Big Brother is watching, he better look out for Cindy Cohn."



**Carolyn Elefant**  
**Founder of myShingle.com**

A big law firm wasn't big enough for Carolyn Elefant. So, she started her own. And harnessed the power of the Internet to build it. One of the first generation of lawyer-bloggers, Carolyn has written and spoken at conferences about small firm practice trends, the ethics of social media, and the future of law.

**Clio's own CEO Jack Newton and Lawyer-in-Residence Joshua Lenon will also be speaking.**

# Conference Topics

In 2014, the conference offers three tracks for learning and discussion: the business of law, legal technology, and smart ways to use Clio.

## Business

Today's lawyers need to think of their practice as a business as well as a profession and this track will help them do just that. Attendees will learn about entrepreneurship, client service, accounting, investment, marketing, staffing, workplace culture, long-term planning, and the mindset of the younger generation of lawyers and clients. Speakers include Mark Britton, Carla Caldwell, George Beaton, Kevin O'Keefe, Alison Monahan, Nicole Bradick, and Joshua Lenon.

## Technology

Attendees will learn more about technologies designed for their needs, explore trends for the future, and see how technology can help make them a better lawyer. From improved communications to digital marketing, from a paperless practice to the use of mobile devices, attendees will hear from leaders such as Sam Glover, Chad Burton, Ernie Svenson, Jabez LeBret, David Lat, and Brian Focht.

## Clio University

A number of Clio staffers will be on hand to offer practical advice and solutions for getting the most out of Clio. Topics include workflow, document automation, collaboration, and efficiencies through Clio, improved billing features, disaster preparedness, and Clio's mobile app. Presentations will be made by members of Clio's support, marketing, sales, and finance teams.

## A rare opportunity

Unique to the Clio Cloud Conference, attendees will also have first-hand and in-person opportunities to speak with Clio's product development team. This gives them a chance to offer input into future features, express concerns or problems they experience with Clio, and present their own ideas for helping to make Clio a better product to best serve the needs of today's forward-thinking lawyers. And ... the developers will listen, strategize, and execute on these suggestions and ideas!

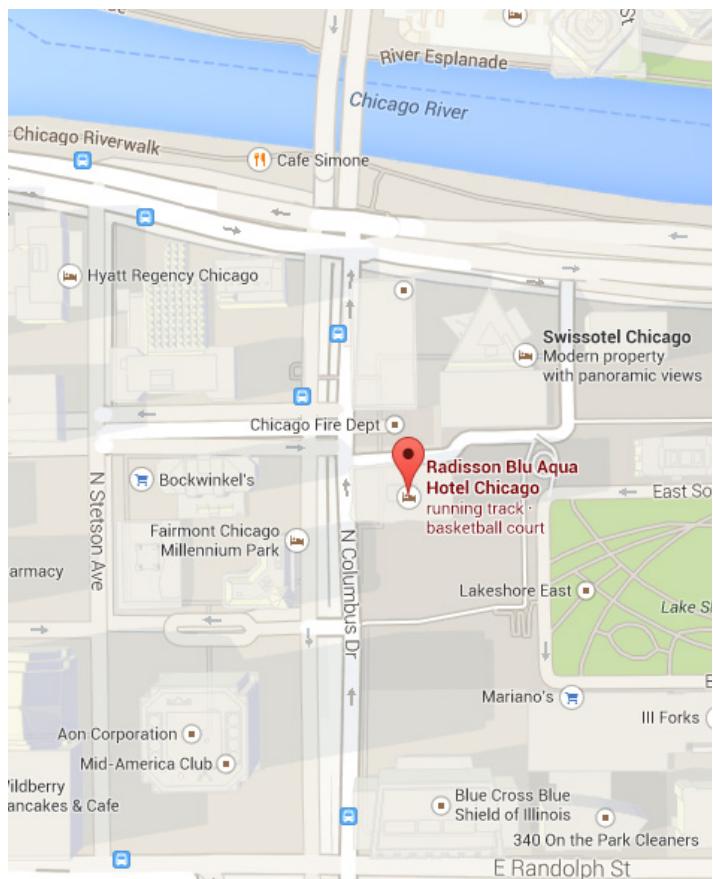
## And great networking opportunities

The Clio Cloud Conference isn't just about serious talks. Clio has designed its conference to be seriously fun and engaging. From morning yoga to nightly events, the conference also provides great opportunities to connect one-on-one in a casual but spirited environment. You'll be able to meet with attendees, speakers, the Clio team, and conference organizers to get their perspective on everything from the future of law to the benefits of cloud computing. And whether you do that in front of dueling pianos or a Cubs-Cardinals game, the opportunities for free flowing discussion and in-person interviews are unrivaled.

# Location

The 2014 Clio Cloud Conference is being held at the Radisson Blu Aqua Hotel in Downtown Chicago.

Radisson Blu Aqua Hotel  
221 N Columbus Dr.  
Chicago, IL 60601



## Getting in Touch with Clio

For more information on Clio, the Clio Cloud Conference, company leaders, and conference speakers, please contact one of the following:



**Tim Travis**  
**Communications Manager**

1-888-858-2546 x659  
tim.travis@clio.com

Tim is the primary media contact for Clio. He can answer questions about the conference, the company, and coordinate connections with Clio team members at the conference in Chicago or at company headquarters in Vancouver.



**Lauren Sanders**  
**Special Projects Coordinator and Executive Assistant**

1-888-858-2546 x131  
lauren.sanders@clio.com

Lauren is the central point of contact for organizing the conference and will be in Chicago during the conference. She can answer questions about the speakers, topics, and arrange for interviews with Jack Newton.



**Derek Bolen**  
**Social Media and Communications Coordinator**

1-888-858-2546 x194  
derek.bolen@clio.com

Derek manages Clio's social media channels and will be in Chicago at the conference. He can answer questions about the speakers, topics, and arrange for interviews with Joshua Lenon and Clio company executives.

## Follow or Connect with Clio Online

**Company website:** [clio.com](http://clio.com)

**Conference website:** [cliocloudconference.com](http://cliocloudconference.com)

**Twitter:** [@goclio #ClioCloud9](https://twitter.com/goclio)

**Facebook:** [facebook.com/GoClio](https://facebook.com/GoClio)

**LinkedIn:** [linkedin.com/company/clio--legal-practice-management-software](https://linkedin.com/company/clio--legal-practice-management-software)

**YouTube:** [youtube.com/user/ClioVideo](https://youtube.com/user/ClioVideo)

**Google+**: [plus.google.com/+Goclio/](https://plus.google.com/+Goclio/)