Signing up Financial Disclosures with a Fast, Reliable eSignature Platform



Introduction

The Disclosure Clinic offers legal consulting and preparation services for financial disclosure documents required by family courts, serving clients in both Canada and the US. Its founder, Shmuel Stern, is an Ontario-based lawyer with over two decades of experience in family law.

Challenges and objectives

The Disclosure Clinic needs to get a lot of documents signed in the course of their preparation services. They started off using another e-signature platform, but it kept falling short of their performance needs. Shmuel found the document turnaround time slower than other platforms, and more importantly, internal links and bookmarks within the documents were lost on signing.

Solution

Shmuel hunted the internet for an alternative, which is when he found BoldSign. He chose BoldSign especially for its:

- Intuitive interface.
- Very fast turnaround of signed documents by email.
- Retention of internal links.

It had all the features he was seeking and proved less glitchy than their previous e-signature software.

Industry
Legal

Product used
BoldSign®

Region
United States

Use case
I am now able to complete many documents very quickly through out a typical day

Results

Disclosure Clinic employees get through their paperwork much faster now that their e-signature platform is easy to use and doesn't cause errors in their documents.

"I am now able to complete many documents very quickly throughout a typical day," Shmuel said.

He was also pleased with the response of the BoldSign support team when he needed clarification on billing matters. "Customer service was prompt and helpful," he said.

> "I appreciate BoldSign's intuitive user interface and quick return of signed documents by email."
>
> **- Shmuel Stern, lawyer and founder of Disclosure Clinic**

Conclusion

Shmuel Stern and the Disclosure Clinic consulting agency have found an e-signing platform they can count on. For anyone else looking for an e-signature platform, Shmuel recommends they try BoldSign, "as it sells itself." To give BoldSign a try, sign up for a **free trial**. If you want more information, schedule a **personalized demo** to see what the platform can do for your company.