6 Reasons to Build Secure File Sharing and E-Signature Into Your Law Firm's CRM Processes

Law firms can share files securely and collect e-signatures by using an encrypted file-sharing platform or client portal instead of email attachments, and a legal e-signature tool that records an audit trail of who signed, when, and from where. E-signatures are legally binding for most legal documents under the federal ESIGN Act and state Uniform Electronic Transactions Act (UETA) laws. Connecting both tools to your CRM and billing software keeps every document tied to the right client and matter.

Lawyers are right to be skeptical of new tech. Tools don't just have to work; they have to meet your duties for security and confidentiality. This guide explains how secure file sharing and e-signatures work for law firms, what's legal, what to look for, and six reasons to use them together.

How Can Law Firms Share Files Securely?

ABA Model Rule 1.6(c) requires lawyers to make reasonable efforts to protect client information, and ABA Formal Opinion 477R says that sometimes means more than regular email, especially for highly sensitive documents. Here's how common sharing methods compare:

Method	Security	Best for
Standard email attachment	Low. Unencrypted once it leaves your server, and easy to misdirect	Routine, non-sensitive messages

Method	Security	Best for
Mail or courier	Moderate. Can be lost, delayed, or misplaced	Originals that must be physical
Consumer file-sharing links	Varies. Links can be forwarded, and permissions are often loose	Internal, low-risk files
Encrypted legal file sharing or client portal	High. Encryption, access controls, and activity tracking	Client documents, evidence, contracts and anything confidential

A confidentiality disclaimer at the bottom of an email doesn't protect the attachment. Even if your own email server is encrypted, a message isn't protected once it leaves your system.

What to look for in secure file sharing for law firms

- **End-to-end encryption** in transit and at rest
- **Access controls**, such as passwords, expiring links, and user permissions
- **Activity tracking** that shows who opened or downloaded a file
- **Large file support**, since legal documents are often too big for email
- **Client-friendly access** from a link or client portal, with no software to install
- **Matter-level organization**, so shared files stay tied to the client and case

Are E-Signatures Legal for Law Firms?

Yes. The federal Electronic Signatures in Global and National Commerce Act (ESIGN Act) and state UETA laws give electronic signatures the same legal effect as handwritten ones for most documents. Nearly every state has adopted UETA, and New York has its own electronic signature law.

There are exceptions. ESIGN and UETA generally don't cover:

- Wills, codicils and testamentary trusts
- Certain family law documents, such as adoption and divorce matters
- Court orders, notices and official court documents, which follow court e-filing rules
- Certain notices, such as foreclosure, eviction and utility shutoff notices

Documents that require notarization follow your state's notary rules, which may allow remote online notarization. Engagement letters, fee agreements, intake forms, contracts, and most business documents can be signed electronically.

E-Signature for Law Firms: What to Look For

- **A tamper-evident audit trail** showing who signed, when, and from which device and IP address
- **Signer verification**, such as email or text verification codes
- **Status tracking**, with alerts when each party signs and when the document is complete
- **Templates** for engagement letters, fee agreements, and intake forms
- **Mobile signing** from a phone, tablet, or laptop
- **Secure storage**, so signed documents are archived and easy to find
- **Integration** with your CRM, billing or practice management software

6 Reasons Law Firms Should Use Secure File Sharing and E-Signature Together

File sharing and e-signature help across your firm, but they're most useful when they're connected to your legal CRM and billing software, where most client contact happens.

1. Speed up client intake

Bringing on a new client means intake forms, engagement letters, and fee agreements. On paper, that means couriers, certified mail, or office visits

that can take days. Clients forget about mail on the counter or keep rescheduling appointments.

With secure file sharing and e-signature, you can send intake forms and the engagement letter as soon as a lead says yes. Clients can sign from their phone at the grocery store, on a work break, or in the school pickup line, and the information flows straight into your CRM. See why lawyers need client intake software.

2. Share large legal documents easily

Legal documents are often too large for email, and mailing them or asking clients to pick them up wastes days. Secure file-sharing platforms like LexShare let you send large files through a secure link, so clients can review documents and approve them with a signature, without printing anything.

3. Keep evidence and case documents in one place

Some practice areas involve a lot of back-and-forth with clients: photos, medical records, receipts, and other evidence. When secure file sharing is connected to your legal CRM, every file a client sends stays attached to their case, so you can find it when you need it.

4. Protect sensitive client information

Small law firms are frequent targets for cybercriminals because they often have fewer safeguards than large firms. See why hackers target law firms and how to avoid phishing. Encrypted file sharing and e-signature tools with strong authentication protect documents from start to finish, and paper files can't be stolen, misplaced or damaged if they never exist. Pair them with this cybersecurity checklist.

5. Make things easier for clients

Signing on a phone is easier than driving to your office, and secure links let clients review documents whenever it suits them. When working with you is easy, clients come back and refer their friends. It also makes working remotely much simpler for your team.

6. Keep a record you can rely on

Every shared file and signed document comes with a record of who sent it, who opened it, and who signed it. That audit trail helps if a signature is ever challenged, and it shows you took reasonable steps to protect client information.

TimeSolv Integrates With LexShare/LexSign and Law Ruler

TimeSolv time tracking and invoicing software makes it easy to capture every billable minute and turn it into accurate invoices. To learn how TimeSolv protects your data, see how secure legal billing software is.

With the LexShare / LexSign integration, you can send documents and collect signatures straight from TimeSolv. Add Law Ruler CRM to streamline client intake and collect information through intake forms.

To see how these tools work together, schedule a demo with TimeSolv today.

FAQ

How can law firms share files securely and collect e-signatures?

Use an encrypted file-sharing platform or client portal instead of email attachments, and an e-signature tool with an audit trail and signer verification. Connect both to your CRM and billing software so documents stay tied to the right client and matter.

What is the most secure way for law firms to share files?

An encrypted legal file-sharing platform or client portal with access controls and activity tracking. Standard email attachments aren't encrypted once they leave your server, and a confidentiality disclaimer doesn't protect them.

Are e-signatures legally binding for law firms?

Yes, for most documents. The federal ESIGN Act and state UETA laws give e-signatures the same legal effect as handwritten signatures. Exceptions include wills and testamentary trusts, certain family law documents, and court orders and notices.

Can engagement letters be signed electronically?

Yes. Engagement letters, fee agreements and intake forms can be signed electronically in nearly every state. Use an e-signature tool that keeps an audit trail of who signed and when.

What should law firms look for in e-signature software?

A tamper-evident audit trail, signer verification, status tracking, templates, mobile signing, secure storage, and integration with your CRM or billing software.

Is it ethical for lawyers to send client documents by email?

For routine matters, often yes. But ABA Formal Opinion 477R says lawyers should use stronger protection, such as encryption or a secure portal, when information is highly sensitive.