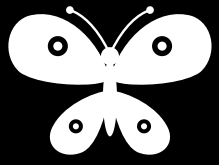
LawBOX

WINTER 2026 EDITION

You Practice Personal Injury Law. We Do the Rest.



For personal injury law firms only.
That's all we do.

MEMBER, NVIDIA INCEPTION

NVIDIA

WWW.GETLAWBOX.COM

PlaaS™ | Personal Injury as a Service

Three Services. One Partner.

From intake to demand, Lien Resolution and Settlement Disbursement, one partner.

01 **Pre-Settlement Case Services** — **$1,000–$1,500 per case, by volume**
Intake to DRAFT demand. The tedious work, taken off the desk.

02 **Lien Resolution & Settlement Disbursement** — **$1,000 per case, up to 4 liens; $100 per additional lien**
Every lien noticed, audited and closed; disbursement accounting for your IOLTA (IOLA in New York).

03 **Document Retrieval Services** — **$100 per records request, plus provider fees at cost**
Police, EMS, hospital and provider records and bills, chased in-house.

WHERE THE DAY GOES

61%[1] of a lawyer's 8-hour day is not recorded as billable

48%[2] of that non-billable time goes to administrative tasks

One paralegal's base pay covers about 40–60 LawBOX cases

At the U.S. median of $61,010 a year[3], before benefits, payroll taxes, training and turnover, against LawBOX at $1,000–$1,500 per case.

1 Clio, *2026 Legal Trends Report* (39% utilization in 2025). 2 Clio, *2017 Legal Trends Report*, cited in Clio's *2023 Legal Trends Report*. 3 U.S. BLS, *Occupational Outlook Handbook*, Paralegals and Legal Assistants (May 2024 median). Range: $61,010 ÷ $1,500 ≈ 41 cases; $61,010 ÷ $1,000 ≈ 61 cases.

FOR THE OWNER

Save money for advertising and growth, or shift your staff to sales, marketing and management.

No firing. No heavy hiring. Advertise more without the headache of hiring a lot more people.

When you grow

Expand with LawBOX. No recruiting, no job ads, no new W-2s.

When you slow down

Pull back without layoffs, HR battles, or FMLA and Department of Labor risk.

Increase marketing? Increase LawBOX capacity. Pull back? Scale back.

Grow Fast. Keep Your People.

You're not firing anyone; your team does more of what matters. Shift your people to sales, marketing and signing new cases.

Keep the case. Keep 100% of the fee. Flat service prices; LawBOX never shares in your legal fees.

Time on desk (TOD) = 12. We decrease the time on desk before the file gets to you.

FIRMS WE SERVICE

PHILLIPS LAW GROUP INJURY LAWYERS

Turnbull Moak Pendergrass LAW FIRM

EDWARD LAW GROUP

THE LAW OFFICE OF BRANDON DIXON P.C.

EASTON & EASTON
A FAMILY OF PERSONAL INJURY ATTORNEYS

FOR CASE MANAGERS & THE OWNERS THEY ADVISE

Your case managers are buried. Let us take it off their desk.

Get far more done with the staff you already have. A named LawBOX case manager takes the repetitive pre-lit work, so your people keep the judgment calls and the client relationships.

WHAT YOUR TEAM STOPS DOING

- ✕ Chasing the same records request again and again
- ✕ Fielding “any update?” calls all day
- ✕ Assembling demand files page by page
- ✕ Covering a desk when someone leaves

WHAT THEY GET BACK

- ✓ Time to sign and work new cases
- ✓ A named case manager to delegate to
- ✓ Every client call written up in your file
- ✓ Your escalation rules, not ours

Your team will love managing us. We do the tedious work: records chasing, letters of representation, follow-up calls, status notes. **Humans + AI:** AI supports records, demands and chronologies; U.S. case managers handle judgment and client interaction. **Plug and play:** like an employee who isn’t one, with your email, signature line and phone extension, and everything uploaded to your CMS.

This brings you success.

Your cases keep moving, even when your team is stretched, short-staffed or between hires.

THE FULL SERVICE MENU

Your Pre-Lit Operation, Handled End to End.

INTAKE & SETUP

- Same-day matter setup in your CMS
- Welcome call: expectations, next steps
- Basic facts of the incident confirmed

INSURERS & COVERAGE

- Claims opened with every carrier
- Claim numbers and adjuster follow-up
- Policy limits, umbrella and excess research

CARE & TREATMENT

- Appointment scheduling with the client's providers
- Treatment status and adherence tracked
- Gaps and missed visits reported

RECORDS & REPORTS

- Police, fire and EMS reports
- Hospital, ER and surgery records
- Bills matched to every record

CLIENT CARE

- A real person on every client call
- Client questions passed to the attorney
- Every call written up in your file

DEMAND TO CLOSE-OUT

- Medical chronology and damages assembled
- DRAFT demand to your firm's template
- Liens noticed and resolved before payout

Your CMS. Your email. Your phone.

We work inside the systems you already use: Filevine, Litify, CASEpeer, Smokeball, Clio, Neos, Mighty, SmartAdvocate and more. Nothing to install, nothing to migrate, no portal. People make every call.

WORKS WITH YOUR CASE MANAGEMENT SYSTEM

Trademarks belong to their owners; no partnership or endorsement implied.

8amCasePeer · Clio · FILEVINE · LITIFY · MIGHTY · Neos · SmartAdvocate · smokeball

HOW WE WORK WITH YOUR FIRM

You Keep. We Take.

YOU KEEP

- ✓ Every legal judgment on the file
- ✓ What the case is worth
- ✓ Whether to accept an offer
- ✓ Whether the case goes into suit
- ✓ The attorney–client relationship
- ✓ Final approval on the demand

WE TAKE

- ✓ Claims and letters of representation
- ✓ Records and bills, in-house
- ✓ Client calls every two weeks
- ✓ A DRAFT demand for attorney review
- ✓ Reduction requests under attorney authority
- ✓ Disbursement accounting for your IOLTA (IOLA in New York)

The cases we take. Motor vehicle and premises liability at the core. No medical malpractice, mass tort, or workers' compensation.

QUICK ANSWERS

Switch platforms?	No. We work inside the systems your firm already runs.
Who approves the demand?	Your attorney reviews, edits, signs and sends it.
Who picks providers?	The Firm alone selects all medical and other providers for its clients; LawBOX does not recommend, refer, or steer clients to any particular provider.
How do we start?	A 15-minute call or a Service Overview Consultation (SOC). Then try us on 5 cases.

LawBOX is not a law firm and does not provide legal advice. All legal judgments, demands, settlement decisions, and client fund disbursements remain with the attorney of record.

Pre-Settlement Case Services

Every new case starts on solid ground. A named case manager opens each signed case in your own system and carries the file to a DRAFT demand your attorney reviews, edits, signs and sends.

PRICE $1,000–$1,500 per case, by volume

WHAT WE DO

- ✓ Claims and letters of representation with every insurer
- ✓ Coverage and liability gathered
- ✓ Records and bills from every provider
- ✓ Care coordination and gap reports

WHY CASE MANAGERS LIKE IT

- ✓ We don't put your client in a queue; your client learns their case manager's name
- ✓ Calls every two weeks, news or no news; automated texts never count as contact
- ✓ Your escalation rules, not ours

STAYS WITH YOUR ATTORNEYS

- ✓ Case acceptance and all legal judgment
- ✓ Advice to the client
- ✓ Whether the case goes into suit
- ✓ Final approval on the demand

WHAT WE DON'T DO

- ✗ Legal advice or case decisions
- ✗ Appearances
- ✗ Sending demands
- ✗ Directing medical treatment

A demand file your attorney can work from. The DRAFT demand package brings together the case history and relevant case-law research for your attorney to review, edit and decide on.

Under Rule 5.3 of the New York Rules of Professional Conduct, the firm supervises the nonlawyers who work on its matters; case acceptance, legal judgment, advice to the client, case value and suit decisions stay with your attorneys. Consistent with Rule 5.4, LawBOX charges flat service prices and never shares in legal fees.

Metrics & Results

Intake	Welcome call and matter setup Same-day setup; first contact within 4 business hours
Claims & coverage	Letters of representation out; limits and liability gathered By day 7 / by day 30
Records	Requested, tracked, retrieved in-house Follow-up every 7 days; complete within 30 days after treatment ends
Client calls	A real person, every two weeks Two-way contact every 14 days
DRAFT demand	Written to your firm's template Within 3 business days of the complete file

THE LAWBOX PACKAGE

Everything assembled so your firm can take the case forward, to trial if needed, in your own system.

1. DRAFT demand or complaint for attorney review
2. All collected case files
3. Accident and police reports
4. Complete medical records and bills

Through settlement. Carrier offers logged and relayed to your attorney; every decision stays with your firm.

Targets we work to, not a promise of any result.

Lien Management

Settled Isn't Paid™. Real lien figures before you settle. Lien work starts at case assignment, so liens never surface at the end.

PRICE **$1,000 per case, up to 4 liens; $100 per additional lien**

1. **Identify & notice.** Every lienholder located and placed on notice.
2. **Monitor.** Claim summaries refreshed every 90 days.
3. **Reduce & lock.** Lien reductions pursued provider by provider. Paralegal and attorney sign off before any reduction is accepted.
4. **Final lien amounts after settlement.** Confirmed in writing with each lienholder before payout.
5. **Close & document.** Disbursement statement for attorney approval; proof of satisfaction for the file.

Settled-case backlog team.
Deployed into firms that need to convert the settled into paid, under your attorney's authority.

Medicare conditional payments are recovery claims under the Medicare Secondary Payer Act, 42 U.S.C. § 1395y(b)(2), and 42 C.F.R. § 411.24. In New York, General Obligations Law § 5-335 limits reimbursement and subrogation claims by many private insurers, but not Medicare, Medicaid or workers' compensation. Which liens apply is a legal judgment for the attorney of record.

Metrics & Results

90 days
claim summary refresh

9
lien types covered

Lien types covered. ERISA, Traditional Medicare, Medicare Advantage, Medicaid, Military (VA & Tricare), FEHBA, private health plans, short- and long-term disability, provider & hospital.

WHAT LAWBOX HANDLES

- ✓ Plan documents (SPD, Form 5500) requested
- ✓ Medicare, Medicaid, ERISA and plan rules tracked
- ✓ Charges audited; unrelated treatment flagged

STAYS WITH YOUR FIRM

- ✓ Authority on every reduction
- ✓ Your firm approves and makes every payment
- ✓ Funds stay in your trust account
- ✓ Every legal judgment on the file

WHAT WE NEED FROM YOU

Case status	Every 90 days.
Trigger events	Mediation or trial set.
Contact changes	New phone, address or counsel for the client.

In New York, client funds are held in an IOLA account under Judiciary Law § 497 or another attorney special account under Rule 1.15 of the New York Rules of Professional Conduct (22 NYCRR 1200.0). Every disbursement is made by the attorney of record; LawBOX does not hold client funds.

Every Record. Every Bill.

Missing records stall settlements. Our own records desk requests, chases and checks every record and bill, and we flag missing records to your firm.

PRICE **$100 per records request, plus provider fees at cost**

WHERE WE GO FOR YOUR FILE

- Police departments
- Fire departments & EMS
- Hospitals & ERs
- Surgery centers
- Urgent care
- Primary care & specialists
- Physical therapy & chiropractic
- Radiology, imaging & MRI
- Pharmacies
- Supplemental records & bills
- Billing departments
- Insurers & adjusters

WHAT WE FLAG TO YOUR FIRM

- ✓ Missing pages and missing dates of service
- ✓ Bills without records; records without bills
- ✓ Providers that stop responding
- ✓ Treatment gaps your attorney should know about

1 **Request.** Using your firm's authorizations.

2 **Chase.** Our records desk follows up every 7 days until fulfilled.

3 **Check & organize.** Against dates of service; bills matched; gaps flagged.

Providers release records under a HIPAA authorization that meets 45 C.F.R. § 164.508(c). Where a covered entity engages LawBOX to handle protected health information on its behalf, a business associate agreement under 45 C.F.R. §§ 164.502(e) and 164.504(e) governs.

Metrics & Results

7 days
records follow-up

30 days
records and bills complete after treatment ends

Which records are in?	Organized by provider and date in your file
What is still missing?	Gaps and missing pages flagged
Which bill goes where?	Bills matched to their records
Who needs to know?	Your team, on every outstanding request

WHY FIRMS CHOOSE THIS

- ✓ Our own records desk, not a retrieval vendor
- ✓ Nothing brokered out
- ✓ No portal, no weekly summary dump

STAYS WITH YOUR ATTORNEYS

- ✓ Review of the medical evidence
- ✓ Which records and bills support the claim
- ✓ Every legal judgment on the file

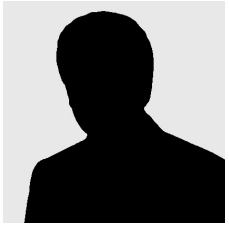
What we don't do. Legal advice, discussing the case with the client, or steering clients to providers.

Targets we work to, not a promise of any result.

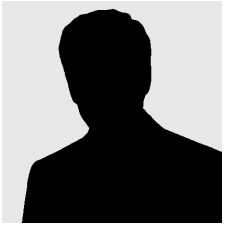
Case files are handled as confidential information under Rule 1.6 of the New York Rules of Professional Conduct, including the duty in Rule 1.6(c) to make reasonable efforts to prevent unauthorized disclosure or access.

THE COMPANY

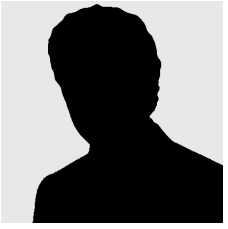
Our Team Is Your Team



Shervin Zade
Co-Founder & Chairman



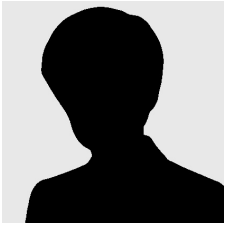
Rody Mehdizadeh
Founder & CEO



Jose Torres, JD
Chief Operating Officer



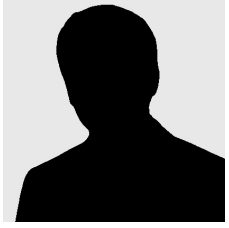
Jake Mehdizadeh
Chief Technology Officer



Ronna Goldberg
Finance



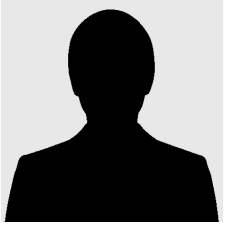
Jackie Maldonado
Case Manager



Oscar Cardenas
Case Manager



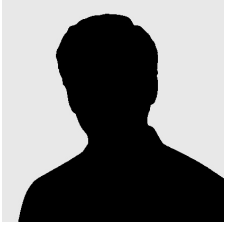
Jaye Banks
Case Manager



Cassandra Garza
Case Manager



Jessica Libet Aranda
Intake



Rafael Mejia
Records Retrieval

Your firm.
One team.

YOUR FIRST 30 DAYS WITH LAWBOX

Day 1	You give us access to your CMS. We walk through your template, contact preferences and escalation rules.
Day 2	Your case manager is assigned by name. You meet them. So does your client.
Same day	Every case you send is set up; first client contact within 4 business hours.
Day 7	Claims opened and letters of representation out.
Day 30	Limits, coverage and liability gathered.

Targets we work to, not a promise of any result. Team portraits are silhouettes made from staff photos.

TEN REASONS

Why Firms Choose LawBOX

01 Scale Up. Scale Down.
No hiring. No firing. No training. Capacity that flexes with caseload.

02 No New Platform.
We work inside the tools you already run. No portal, no migration.

03 Your Systems Stay.
Your templates, your providers, your escalation rules stay yours.

04 Start With 5 Cases.
The only real test is your own files. Try us on five.

05 Client Contact Every 2 Weeks.
A named case manager. A real person. Less time on your desk.

06 Don't Refer Out.
Capacity is no reason to send work away. Keep the case and the fee.

07 Take More Referrals.
Say yes to more referred cases without adding headcount.

08 When a Manager Leaves.
Your cases don't stop. Overflow and backup on call.

09 More Marketing Spend.
Put payroll dollars toward advertising and growth, not idle seats.

10 Keep Your Vendors.
Add LawBOX as backup and overflow. Keep every relationship you have.

Flat service prices. We never share in your legal fees.
For personal injury law firms only. One accountable partner through pre-lit instead of a patchwork of vendors.

LawBOX

NEXT STEP

Book a Service Overview Consultation (SOC)

Or a 15-minute call. Then try us on 5 cases.

CALL	EMAIL	WEB
(212) 465-1777	info@getlawbox.com	www.getlawbox.com

One MSA

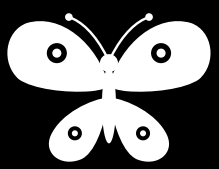
One accountable partner from intake to demand, liens and records.

Your attorneys decide

Every legal judgment, demand and disbursement stays with your firm.

Personal injury only

No other practice areas. Pre-lit is all we do.



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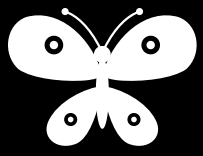

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