Overview

Your firm's financial performance and the work that needs attention.

+ Add client + Add matter

This month | Quarter | Year to date | Custom

October 1–31, 2026 | CAD

REVENUE
$68,400
↑ **10.3%** vs. September

DISBURSEMENTS
$8,100
6.6% higher vs. September

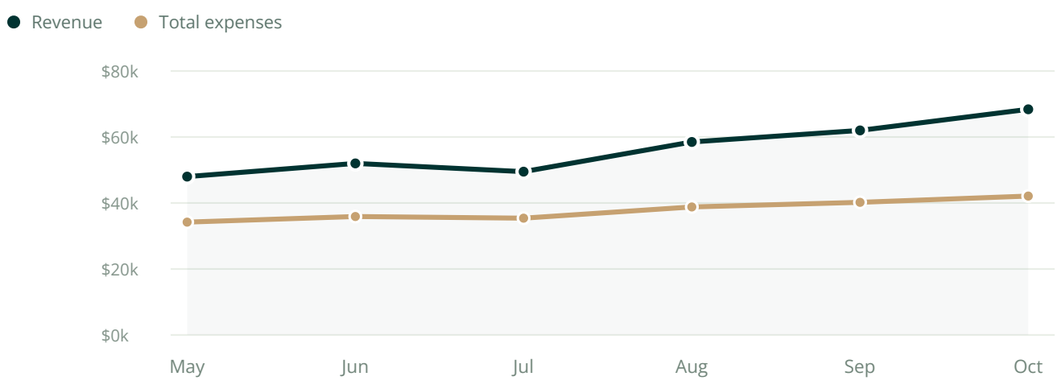
OPERATING EXPENSES
$34,000
4.3% higher vs. September

NET INCOME
$26,300
↑ **20.6%** · 38.5% margin

Revenue & expenses

MAY – OCT 2026

Six-month performance



Total expenses = disbursements + operating expenses

Matters by type

48

Active matters at October 31

Real estate	24 · 50%
Estate planning	14 · 29%
Estate administration	8 · 17%
Other matters	2 · 4%

Share of active matters

View matters →

Operational priorities

Today · November 2, 2026

12 matters opened in Oct **9** completed in Oct

03 Due today Today
Document reviews and client updates
Next: Alex Morgan · Jordan

02 Waiting on clients
Missing information or approvals
Next: Daniel Chen · Sam

01 Overdue invoice $1,800
Review the balance before follow-up
Alex Morgan · Jordan