

# NC IOLTA STATUS UPDATE FORM

**I am submitting this form to:**  
(check all that apply and complete relevant fields)

**Fields A & E are REQUIRED Fields  
for all reported changes.**

- Notify the IOLTA office of changes in  
employment or address (Field A)
- Open a new IOLTA account or convert  
an existing account to IOLTA (Field B)
- Close an IOLTA Account (Field C)
- Declare exempt status (Field D)

Return completed form to the IOLTA office.

## FIELD A – REQUIRED

Name: \_\_\_\_\_

Bar ID: \_\_\_\_\_

Firm/Employer Name: \_\_\_\_\_

(Please attach a list of any additional attorneys, with their NC Bar ID numbers,  
for which the reported change applies)

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

## FIELD B IOLTA ACCOUNT INFORMATION

The following general trust accounts are, or should be, established as IOLTA Accounts

- |                     |                     |
|---------------------|---------------------|
| I.                  | II.                 |
| Account Name: _____ | Account Name: _____ |
| Acct. Number: _____ | Acct. Number: _____ |
| Bank Name: _____    | Bank Name: _____    |

(For additional accounts, please attach a separate sheet)

## FIELD C CLOSING AN ACCOUNT

I am closing the following IOLTA account:

Account Name: \_\_\_\_\_

Acct. Number: \_\_\_\_\_

Bank Name: \_\_\_\_\_

(For additional accounts, please attach a separate sheet)

## FIELD D EXEMPT STATUS

I am exempt because:

- I am in private practice in NC, but I (my firm)  
do (does) not maintain a general trust account.
- I am not in private practice and do not handle  
client funds.
- I do not practice law in North Carolina.

## FIELD E - REQUIRED

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_

## MAIL FORM TO:

NC IOLTA  
PO Box 2687  
Raleigh, NC 27602-2687

Or fax toll-free to:  
888-828-1718