

NC IOLTA STATUS UPDATE FORM
Field A is a Required Field for All Reported Changes
Complete All Relevant Fields

I am submitting this form to:

- 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 attorney status (Field D)

Check All That Apply
Complete All Relevant Fields

FIELD A – REQUIRED

Name: _____

NC State Bar #: _____

Firm/Employer Name: _____

(Please attach a list of attorneys with NC State Bar numbers and any settlement agents for which the reported change applies)

Address: _____

City, State, Zip: _____

Phone: _____

E-mail: _____

FIELD B

IOLTA ACCOUNT INFORMATION

The following general trust/escrow accounts are to be established as IOLTA Accounts

I.

Account Name: _____

Acct. Number: _____

Bank Name: _____

II.

Account Name: _____

Acct. Number: _____

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 ATTORNEY STATUS

I am an exempt attorney 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 NC client funds.
- I do not practice law in North Carolina.

FIELD E

Signature: _____

Print Name: _____

Date: _____

SEND COMPLETED FORM TO:

NC IOLTA
PO Box 2687
Raleigh, NC 27602-2687

Toll-free Fax #:
888-828-1718

e-mail
iolta@ncbar.gov