

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