

**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)
- Update IOLTA 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**

**IOLTA STATUS**

My current IOLTA Status is:

IOLTA ACCOUNTS: I/my firm have North Carolina IOLTA accounts.

NO IOLTA ACCOUNTS: Neither I nor my employer hold any North Carolina client funds.

**FIELD E**

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

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

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

**SEND COMPLETED FORM TO:**

NC IOLTA  
PO Box 25996  
Raleigh, NC 27611-5996

Fax Number:  
919-821-9168

e-mail  
iolta@ncbar.gov