

2025 Mandatory NC IOLTA Compliance Certification

NAME: _____ BAR ID: _____

Under the NC State Bar's IOLTA rules, lawyers must certify their IOLTA status **annually** when paying their NC State Bar dues. If you have not certified, either visit the NC State Bar Member Portal at <https://portal.ncbar.gov> or complete and submit the form below.

Please certify below that **either** *all general client trust accounts* (those that hold short-term and nominal deposits) maintained by the lawyer/law firm for North Carolina client funds are IOLTA accounts **or** that your status is Exempt as defined below.

Check A or B to make your MANDATORY IOLTA Certification

A. (☐) NC IOLTA ACCOUNTS: I certify that all of my firm's general client trust accounts for North Carolina client funds are established as North Carolina IOLTA Accounts.

Name of Law Firm/ Employer: _____

OR

B. (☐) NO NC IOLTA ACCOUNTS: I certify that neither I nor my employer maintain any general trust accounts holding North Carolina client funds.

Name of Law Firm/ Employer: _____

If you have questions regarding compliance, contact NC IOLTA at iolta@ncbar.gov or 919-828-0477.