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.  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  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

NC IOLTA * PO Box 25996 * Raleigh, NC 27611-5996 * 919-828-0477
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