

2024 NC IOLTA Information Update Form

Field A – REQUIRED

Name: _____

NC State Bar #: _____

I am submitting this form to notify the IOLTA office of the following: (check all that apply)

- Changes to attorney contact information (Field B)
- New law firm or firm name change (Field C)
- Opening of a new IOLTA account (Field D)
- Closing of an IOLTA account (Field E)

Field B – Changes to Contact Information

Employer: _____

Address: _____

Phone: _____ e-mail: _____

Changes in contact information should also be reported to the NC State Bar Membership Department at 919-828-4620 or on-line at www.ncbar.gov.

Field C– New Firm Information (Include firm name changes and mergers here)

New Firm Name: _____

Address: _____

Phone: _____ e-mail: _____

Please include a list of all NC attorneys associated with the new firm.

Field D - New IOLTA Account Information

The following general trust accounts have been established as an NC IOLTA account:

Firm Name: _____

1. Account Name: _____

Account Number: _____

Bank Name: _____

2. Account Name: _____

Account Number: _____

Bank Name: _____

(For additional accounts, please attach a separate sheet.)

Field E – Closing an IOLTA account

The following IOLTA accounts have been closed:

Firm Name: _____

1. Account Name: _____

Account Number: _____

Bank Name: _____

Date Closed: _____

2. Account Name: _____

Account Number: _____

Bank Name: _____

Date Closed: _____

My firm now has no open IOLTA accounts