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## IOLTA Update Form

Please use this form only if you are unable to update your IOLTA information on-line at [www.calbar.org/iolta](http://www.calbar.org/iolta).

### Interest on Lawyers' Trust Accounts (IOLTA) Update Form

**The State Bar of California**  
**Legal Services Trust Fund Program**  
*Trust Account Information Report*

If you have recently changed your employment or established a new IOLTA account, please complete this page. You may mail it to the Legal Services Trust Fund Program, The State Bar of California, 180 Howard Street, San Francisco, California 94105-1617, or fax to (415) 538-2389.

**FULL NAME:** \_\_\_\_\_ **MEMBER NUMBER:** \_\_\_\_\_

**CHECK ONE:**

- I am an attorney (or work for a law firm) which, in the course of the practice of law, receives or disburses trust funds in order to comply with the Legal Services Trust Fund Program legislation, I have (or my firm has) established an IOLTA account. ENCLOSE THIS PAGE WITH A BLANK DEPOSIT SLIP FOR ANY ACCOUNT YOU HAVE CLOSED (MARK "CLOSED") AND ALL CURRENTLY OPEN ACCOUNTS (MARK "OPEN").

Law Firm: \_\_\_\_\_

- I have not established an IOLTA account (or I have closed my previous account) as I am not covered by the legislation because,
- I am not engaged in the practice of law,
  - I/We do not receive, or disburse any client or third-party funds in the practice of law,
  - I/We only hold client trust funds in amounts that are large enough and held for a long enough period of time to earn income in excess of the costs to secure such income, or
  - I am not legally required to hold an IOLTA account for other reasons.

If you have questions about this program, you may call the Legal Services Trust Fund Program at (415) 538-2227 or email to [iolta@calbar.ca.gov](mailto:iolta@calbar.ca.gov).