IOLTA Update Form

Please use this form only if you are unable to update your IOLTA information on-line at 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, or fax to 415-538-2529.

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 e-mail to iolta@calbar.ca.gov.

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