



# The State Bar of California

**Note: This is not a complete list of all rules and resources related to client trust accounting.**

## **CLIENT TRUST ACCOUNT DUTIES AND RESPONSIBILITIES**

### **California Rules of Professional Conduct**

- [Rule 1.15 Safekeeping Funds and Property of Clients and Other Persons](#)
- [Rule 1.4 Communication with Clients](#)
- [Rule 5.3 Responsibilities Regarding Nonlawyer Assistants](#)

### **Rules of the State Bar**

- [Title 2 Rights and Responsibilities of Licensees, Division 5 Trust Accounts](#)

### **Client Trust Accounting Resources**

- [2023 Handbook on Client Trust Accounting for California Attorneys \(PDF\)](#)
- [Client Trust Account School](#)
- [Webpage Resources](#)

## **DISCIPLINARY PROVISIONS**

### **Business and Professions Code**

- [6091](#)
- [6091.1](#)

## **CLIENT TRUST ACCOUNT PROTECTION PROGRAM (CTAPP)**

### **California Rule of Court**

- [Rule 9.8.5 State Bar Client Trust Account Protection Program](#)

### **Rules of the State Bar**

- [Title 2 Rights and Responsibilities of Licensees, Division 1 Licensee Record, rule 2.5 Client Trust Account protection program annual reporting, account registration and self-assessment completion requirements](#)

### **CTAPP Resources**

- [Webpage Resources](#)
- [CTAPP Training](#)
- [CTAPP FAQs](#)

**State Bar Ethics Hotline: 800-238-4427**