

2017 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

Date: _____

Print Name: _____

Signature: _____

SEND COMPLETED FORM TO:

NC IOLTA
PO Box 25996
Raleigh, NC 27611-5996

Fax Number:
919-821-9168

e-mail
iolta@ncbar.gov