

NC IOLTA SETTLEMENT AGENT 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 address, phone or e-mail (Field A)

Open a new IOLTA account or convert an existing account to IOLTA (Field B)

Close an IOLTA Account (Field C)

Check All That Apply
Complete All Relevant Fields

FIELD A – REQUIRED

Name: _____

Company / Employer Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

E-mail: _____

FIELD B

OPENING AN IOLTA SETTLEMENT AGENT ACCOUNT

The following settlement agent accounts are to be established as IOLTA Accounts

I.

Account Name: _____

Acct. Number: _____

Bank Name: _____

II.

Account Name: _____

Acct. Number: _____

Bank Name: _____

(For additional accounts, please attach a separate sheet)

FIELD C

CLOSING AN IOLTA SETTLEMENT AGENT ACCOUNT

The following settlement agent accounts have been closed

I.

Account Name: _____

Acct. Number: _____

Bank Name: _____

II.

Account Name: _____

Acct. Number: _____

Bank Name: _____

(For additional accounts, please attach a separate sheet)

SEND COMPLETED FORM TO:

NC IOLTA
PO Box 25996
Raleigh, NC 27611-5996

Fax Number:
919-821-9168

e-mail
iolta@ncbar.gov