

**INTEREST ON LAWYERS' TRUST ACCOUNTS (IOLTA)
INTEREST ON TRUST ACCOUNTS (IOTA)
ENROLLMENT FORM**

NAME OF FINANCIAL INSTITUTION _____

NAME OF LAW FIRM/ENTITY (Depositor) (PLEASE PRINT) _____

CONTACT PERSON FOR LAW FIRM/ ENTITY (PLEASE PRINT) _____

Depositor will participate in the:

___ **Connecticut Interest on Lawyers' Trust Accounts (IOLTA) program.**

___ **Connecticut Interest on Trust Accounts (IOTA) program.**

The depositor hereby instructs the financial institution to establish an IOLTA/IOTA account in the name of the depositor, as follows:

- (1) The depositor's IOLTA/IOTA account is to be established and governed by customary rules and procedures governing interest-bearing accounts. Interest will be accrued and paid in the same manner and at the same interest rate, or higher, customarily applicable to interest-bearing checking accounts.
- (2) Most banks waive service charges in Connecticut. If not waived, any service charges must be limited to customary service charges on other interest-bearing checking accounts or the amount of interest which has accrued in the depositor's IOLTA/IOTA account, whichever is less.
- (3) All accrued interest shall be remitted to the Connecticut Bar Foundation, together with a statement indicating the name of depositor, account number, principal balance, amount of interest accrued, interest rate, and amount of service charge (if any) deducted from accrued interest.
- (4) The taxpayer I.D. number for all IOLTA/IOTA accounts is **#06-6079763**.
- (5) Accrued interest shall be remitted to the Foundation's account by ACH or wire transfer or by mail to:
Connecticut Bar Foundation
31 Pratt Street, Suite 420
Hartford, CT 06103
- (6) Depositor hereby agrees that it shall have sole responsibility for determining what funds shall be deposited to the IOLTA/IOTA account.

TRUST ACCOUNT # _____

LAWYER JURIS # (if applicable) _____

ADDRESS OF DEPOSITOR (PLEASE PRINT)

AUTHORIZED SIGNATURE _____

TELEPHONE _____

FAX _____

DATE SIGNED _____

AUTHORIZED BANK REPRESENTATIVE (PLEASE PRINT)

SIGNATURE

Please retain a copy of this notice and forward a copy to:

Connecticut Bar Foundation
31 Pratt Street, Suite 420
Hartford, CT 06103
Telephone (860) 722-2494
Fax (860) 722-2497