

# ATTORNEY'S NOTICE OF ENROLLMENT

## Notice to Financial Institution to Establish an IOLTA Account

### ATTORNEY INFORMATION

**INSTRUCTIONS TO ATTORNEYS:** (1) COMPLETE THE "ATTORNEY INFORMATION" SECTION, (2) BRING THIS FORM TO THE FINANCIAL INSTITUTION OF YOUR CHOICE, (3) AFTER THE INSTITUTION HAS COMPLETED ITS SECTION BELOW, SEND THE PINK COPY TO THE IOLTA COMMITTEE **ALONG WITH A DEPOSIT SLIP OR VOIDED CHECK.**

Firm Name: \_\_\_\_\_

Attorney Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Telephone: \_\_\_\_\_

The undersigned hereby enrolls in the comprehensive Interest on Lawyers' Trust Accounts (IOLTA) program established by the Massachusetts Supreme Judicial Court. Under this program, please open an account subject to negotiable orders of withdrawal (NOW, SuperNOW Account or other suitable interest-bearing account).

Authorized Signatories: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

*(Attach additional sheets for additional signatories)*

### FINANCIAL INSTITUTION INFORMATION

**NOTE TO FINANCIAL INSTITUTIONS:** Please call (617) 723-9093 if you require assistance in setting up this account.

Financial Institution Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Telephone: \_\_\_\_\_

Date Opened: \_\_\_\_\_ By: \_\_\_\_\_  
*(Financial Institution Representative)*

Account Name: \_\_\_\_\_

Account Number: 

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**Please attach deposit slip or voided check to the PINK IOLTA Committee copy.**

Interest as computed in accordance with your standard account disclosure should be remitted monthly or quarterly to:

**THE MASSACHUSETTS IOLTA COMMITTEE**  
**7 WINTHROP SQUARE, 3RD FLOOR**  
**BOSTON, MA 02110-1245**  
(617) 723-9093

**TAXPAYER I.D. NO. 04-3168608**

Remittance of interest may be made by your bank check via U.S. mail to the above address, or by Electronic Funds Transfer. Please call the IOLTA Committee for specific instructions on electronic payments. For each remittance, please submit a complete "Interest Remittance Report" and "IOLTA Summary Sheet".

For more complete instructions on opening and remitting interest on IOLTA accounts, contact the IOLTA Committee and request the "Operations Handbook for Financial Institutions".

**WHITE ~ BANK                      YELLOW ~ ATTORNEY                      PINK ~ SEND TO IOLTA**