



Understanding IOLTA Rules & How to Comply

Newburyport Community/Senior Center 331
High Street, Newburyport,
4:00-6:30 p.m.

Tuesday, October 22, 2019

Eligible for Two Ethics Credits

AGENDA/SCHEDULE

- 4:00-4:10 Welcome & Introductions
Thomas G. Nicholson, Esq., Finneran & Nicholson, P.C., Newburyport,
Moderator
- 4:10-4:50 Traps for the Unwary
Jayne Tyrrell, Esq., Executive Director, Mass. IOLTA Committee
- 4:50-5:00 Q & A
- 5:00-5:30 What You Should Know About IOLTA Accounting & the BBO
Sara N. Holden, Esq., Brecher Wyner Simons Fox & Bolan, P.C., Newton
- 5:30-5:40 Q & A
- 5:40-5:50 Networking Break
- 5:50-6:20 Best Practices in Bookkeeping
Janet Sargent, Owner, Easy Beans Bookkeeping, Inc, Amesbury
- 6:20-6:30 Q & A

Attend & Learn:

- How long can you keep a retainer
- When can you transfer IOLTA funds
- What are the various ways that the BBO obtains your IOLTA info
- What bookkeeping practices you should implement

To Register: <https://www.onlineregistrationcenter.com/IOLTA>