

(ATTORNEY: Please complete this form and submit it to your financial institution)



The Arizona IOLTA Program is administered by the Arizona Foundation for Legal Services & Education

NOTIFICATION TO IOLTA APPROVED FINANCIAL INSTITUTION
regarding an Arizona IOLTA account

TO: _____
(Bank) (Branch)

The undersigned is a participant in the interest-bearing trust account program mandated by Rule 43 of the Rules of the Supreme Court of Arizona. Under this program, the undersigned's law firm's trust account

(Account Number) (Account Name)

should be placed in an interest-bearing account under the **Tax ID No. 95-3351710** and should be identified with the words "**AZ IOLTA**" or "**AZ Trust**" following the attorney or firm name in the title of the account.

The Arizona Foundation for Legal Services & Education has previously provided your institution with the guidelines for the program and report forms that you are to complete and file with the Foundation. These are available also at <https://www.azbf.org/iolta/iolta-for-banks>. Please provide the undersigned law firm with a copy of the report submitted to the Foundation or a regular monthly statement. No form 1099 is to be filed with the IRS.

The undersigned authorizes the disclosure of this account information to the Arizona IOLTA program.

(Signature) (State Bar Number)

(Print name) (Date)

(revised 4/19)