

*This form is due by February 2, 2015.*

## 2015 Annual Interest on Lawyers' Trust Accounts (IOLTA) Program Report

**This form must be completed by every active member of the Oregon State Bar  
whether or not the member has a trust account.**

*To complete this form online, log in to your account at [www.osbar.org](http://www.osbar.org)*

**Please provide the following information about you, your firm and your trust account:**

Lawyer: \_\_\_\_\_

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

1. ☐ I engage in the practice of law in Oregon and, in the course of my practice, hold possession of client funds or funds of third persons, pursuant to RPC 1.15-1 and RPC 1.15-2, in the following Oregon IOLTA trust account(s):

Name of Financial Institution (s)	City/State	Bank Routing Number	Oregon IOLTA Trust Account Number

The bank routing and account numbers appear at the bottom of your check:

123456789 0123456789012 1001  
Bank Routing \* Account Number Check #

2. ☐ I engage in the practice of law in Oregon, but my trust account/accounts is/are maintained in another jurisdiction where my law office is situated.
3. ☐ I engage in the practice of law in Oregon, but do not hold possession of client funds or funds of third persons in the course of my practice.
4. ☐ I do not engage in the practice of law in Oregon.

**I hereby certify that the above information is true and correct to the best of my knowledge and belief.**

Date

Signature

Oregon State Bar Number

If you have questions, please contact the OSB IOLTA Reporting at (503) 431-6373.

Email to: IOLTA@osbar.org

Fax to: (503) 598-6903

Mail to: Attn: IOLTA Reporting  
Oregon State Bar  
P.O. Box 231935  
Tigard, OR 97281-1935

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## IOLTA Reporting FAQ

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**1. Why do I need to complete an Annual IOLTA Certification?**

ORS 9.675 mandates that every active member certify annually to the bar whether the member maintains any lawyers trust account in Oregon. The member must disclose the financial institution in which each account is held and the account number for each account. This form includes the reporting of a member's Oregon IOLTA account and not an individual client trust account. Please do not report IOLTA accounts from other states.

**2. Who needs to complete this form?**

All active members of the Oregon State Bar need to complete an IOLTA Certification.

**3. What if I do not have an IOLTA account?**

You still need to complete the form by checking box 2, 3 or 4, which ever applies to your situation. Check only one box.

**4. Does each lawyer in the firm have to fill out a separate form?**

Yes, each Oregon State Bar active member in the firm must individually sign and return a form.

Please fill out the law firm's IOLTA account information then make copies of the form and distribute to each individual attorney for his/her signature.

**5. I am an associate at a law firm but do not have any control over the trust account. How do I complete the form?**

You will need to check box 1 and also complete the IOLTA account information section with the firms IOLTA account information.

**6. What if I am a judge or judicial clerk? How do I file?**

Check box 4 indicating you do not engage in the practice of law in Oregon.

**7. How do I complete the form if I am an active member of the bar but not currently practicing and still have a trust account open?**

You will have to file your response by hard copy because the online form cannot accommodate this scenario. Check box 4 and complete the IOLTA account information requested in number 1.

**8. What if my office is in another state?**

If you have your IOLTA account in that state then please check box 2 and leave the financial information blank.