



INTEREST ON LAWYERS TRUST ACCOUNTS (IOLTA) ENROLLMENT FORM

INSTRUCTIONS: Please complete this form and provide the original to your financial institution, retain a copy for your records, and send a copy to the South Carolina Bar Foundation via email: iolta@scbarfoundation.org; fax: 803-779-6126; or mail: South Carolina Bar Foundation, PO Box 608, Columbia, SC 29202. For questions, please call 803-765-0517. If completing this form for a firm, attach a list of attorneys (including bar numbers) who will use the account in the regular course of practice.

This form is used for:

- Opening an IOLTA account or
- Converting a non-interest bearing trust account to an IOLTA account

NAME OF ELIGIBLE FINANCIAL INSTITUTION: _____

NAME OF LAW FIRM/ENTITY (Depositor): _____

CONTACT PERSON FOR LAW FIRM/ENTITY: _____

ADDRESS OF LAW FIRM/ENTITY: _____

PHONE: _____ EMAIL: _____ FAX: _____

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

- The depositor's IOLTA account is to be established at an "eligible institution" as determined by the South Carolina Bar Foundation (a list is available at www.scbarfoundation.org). The account shall be maintained as an interest bearing checking account or an investment product which is a daily (overnight) financial institution repurchase agreement or an open end money market fund.
- The taxpayer I.D. number for all IOLTA accounts is **#23-7181552**.
- Monthly bank statements should be sent to the account owner, not the Bar Foundation.
- Accrued interest shall be remitted to the South Carolina Bar Foundation by ACH transfer or by check mailed to: South Carolina Bar Foundation, PO Box 608, Columbia, SC 29202.

TRUST ACCOUNT #: _____ SC BAR #: _____

AUTHORIZED SIGNATURE: _____ DATE: _____

AUTHORIZED BANK REPRESENTATIVE (please print): _____

AUTHORIZED BANK REPRESENTATIVE SIGNATURE: _____ DATE: _____