



## IOLTA Certification FAQ

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

Chapter 304 of Oregon Laws 2011 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 only includes the reporting of a member's IOLTA account and not an individual client trust account.

**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. We are a law firm and received only one copy of the form in the OSB Membership Dues packet. Does each lawyer 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.