

This form is due by February 1, 2010.

**2010 Annual Certification of Compliance with Oregon RPC 1.15-2
Interest on Lawyers' Trust Accounts (IOLTA) Program**

This form must be completed by every 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

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, these funds are held in the following Oregon IOLTA trust account(s):

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

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 Compliance at (503) 431-6373.

Complete and return with your 2010 OSB fees payment or send separately to:

Fax to: (503) 598-6903
Mail to: Attn: IOLTA Compliance
Oregon State Bar
P.O. Box 231935
Tigard, OR 97281-1935

IOLTA Certification FAQ

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

The Oregon Rules of Professional Conduct at 1.15-2 (m) mandates that every lawyer certify annually that they are in compliance with Rule 1.15-1 and 1.15-2. The full text of 1.15-2 (m) is as follows:

ORPC 1.15-2 (m) every lawyer shall certify annually on a form and by a due date prescribed by the Oregon State Bar that the lawyer is in compliance with Rule 1.15-1 and this rule. Between annual certifications, a lawyer establishing an IOLTA account shall so advise the Oregon Law Foundation in writing within 30 days of establishing the account, on a form approved by the Oregon Law Foundation.

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

All members of the Oregon State Bar need to complete an IOLTA Certification. This includes attorneys with an inactive status.

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 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 firm's 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.