

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 <u>Tax ID No. 95-3351710</u> and should be identified with the words <u>"AZ IOLTA" or "AZ Trust"</u> 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 <a href="https://www.azbf.org/iolta/iolta-for-banks">https://www.azbf.org/iolta/iolta-for-banks</a>. Please provide the undersigned law firm with a copy of the report submitted to the Foundation or a regular monthly statement. <u>No form 1099 is to be filed with the IRS.</u>

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

(Signature)

(State Bar Number)

(Print name)

(Date)

(revised 4/19)

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