

CHANGE OF STATUS FORM

You should use this form *if your account status changes during the year*. Complete the form and sign the bottom portion. Please return this to the SC Bar Foundation via fax or mail.

Note: If you are establishing a new IOLTA account or converting an account to the IOLTA program, you should not use this Change of Status form, but should use the Enrollment Form for Lawyers and Law Firms.

Your election may require more than one response below.

Name: _____ Bar Number: _____

1. I am joining a firm that participates in IOLTA.

Account number: _____

Firm name: _____

Financial institution: _____

2. My account status is changing.

_____ I am closing my trust account, No. _____ at

_____ (financial institution).

In closing this account, I am (choose one of the following):

_____ opening a new account to satisfy Rule 412 and have completed the *Enrollment Form for Lawyers and Law Firms*.

_____ joining a firm that participates in IOLTA. My new account information is provided in Section 1 above.

_____ still a participant as I have another IOLTA account.

_____ now excluded from the IOLTA program.

For definitions on exclusion, please see the Q&A section of the manual. If you seek exemption, please contact the Bar Foundation.

Signature: _____

Print Name: _____

Phone: _____ Date: _____

FAX TO: (803) 779-6126

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