

DC IOLTA Program

Opening a DC IOLTA Account Checklist

- Pick the correct bank. Approved, participating banks are listed at: www.dcbfoundation.org. *DC IOLTA Prime Partner Banks*, which send more interest to support legal services for DC's underserved, are listed first.
- Print the IOLTA Account Registration Form from the DC Bar Foundation website, fill out everything except the bank information, and bring it with you to the bank to complete. Send a copy of the completed form to the DC Bar Foundation. Mailing address, email, and fax are on the form.
- Make sure the account is opened with you/your law firm as the owner, with the correct title: “[your/your law firm’s name] DC IOLTA Account.”
- Make sure the account is opened with the DC Bar Foundation’s Taxpayer Identification Number (TIN). This number is on the IOLTA Account Registration Form.
- Make sure the account is an interest-bearing account and that the interest earned on the account will be sent to the DC Bar Foundation.
- Make sure the account statements will be sent to you/your law firm.
- Review the first statements that you receive to make sure the account is operating as you intended. Contact the bank and/or the Bar Foundation with any questions.
- Contact the DC Bar Foundation with any questions: 202-467-3750 or iolta@dcbfoundation.org