

COLTAF ENROLLMENT FORM

The Colorado Lawyer Trust Account Foundation ("COLTAF") administers Colorado's Interest on Lawyers Trust Account ("IOLTA") Program, established by the Colorado Supreme Court. The undersigned hereby authorizes the named Financial Institution to open an interest or dividend bearing COLTAF account, in compliance with Colorado Rule of Professional Conduct 1.15.

LAWYER INFORMATION

INSTRUCTIONS TO LAWYERS: This form should be completed to open your COLTAF account at an Approved Financial Institution, and then sent to COLTAF (by fax, email, or regular mail) at the time the account is opened at the address below.

Firm Name: _____

Lawyer Name: _____

Mailing Address: _____ E-mail: _____

City: _____ State: _____ Zip Code: _____ Telephone: _____

Attorney Registration Number (optional): _____

Authorized Signature Lawyer/Law Firm: _____

FINANCIAL INSTITUTION INFORMATION

INSTRUCTIONS TO FINANCIAL INSTITUTIONS: The COLTAF account must be established in the name of the lawyer or law firm opening the account. The account and all deposit slips and checks drawn thereon must be prominently designated as "COLTAF Trust Account". COLTAF's Taxpayer Identification Number (TIN) must be assigned to the account (**#74-2250921**), and interest or dividends earned on the account must be remitted to COLTAF. COLTAF is a tax exempt organization and is exempt from backup withholding. No IRS form 1099 is required for COLTAF accounts, and the financial institution is not subject to penalty for a mismatched TIN when the payee is an exempt organization. The Colorado Supreme Court, Federal Reserve Board, Federal Deposit Insurance Corporation, Office of the Comptroller of the Currency and the IRS have approved this program.

Financial Institution Name: _____

Address: _____ Telephone: _____

By (financial institution representative): _____ Date : _____

Account Name: _____

Account Number: _____

Interest or dividends for this account computed in accordance with Rule 1.15 must be remitted monthly to:

Colorado Lawyer Trust Account Foundation (COLTAF)

1120 Lincoln Street, #701

Denver, CO 80203

Phone: 303-863-7221

Fax: 303-863-7226

Email: coltaf@legalaidfoundation.org

www.coltaf.org

TAXPAYER I.D. NO. 74-2250921

Copies of this form should be retained by the **BANK**, the **LAWYER**, and **COLTAF**