



## NOTICE TO BAR FOUNDATION FORM

(to be completed by lawyer/law firm for each IOTA account)

### IOTA ACCOUNT

Please enter your IOTA account number exactly as assigned by your eligible institution (do not omit any numbers).

\_\_\_\_\_

### ELIGIBLE INSTITUTION

FBF USE ONLY

(Name)

(Address)

(City)

(State)

(Zip Code)

(Contact) *optional*

(\_\_\_\_\_) *optional*  
(Telephone)

### LAWYER/LAW FIRM

FBF USE ONLY

(Name)

(Law Firm) *if applicable*

(Address)

(City)

(State)

(Zip Code)

(Contact)

(\_\_\_\_\_) *optional*  
(Telephone)

(Email Address) *optional*

I/my law firm is establishing this IOTA account in compliance with 5-1.1(g) Rules Regulating The Florida Bar (IOTA Program) for all nominal or short-term funds of clients or third persons that "... the lawyer has determined cannot practicably be invested for the benefit of the client or third person." Client or third-person trust funds that lawyers or law firms determine can earn income for the individual client or third person, in excess of the costs to secure such income, cannot be deposited into IOTA accounts. For further guidance in determining IOTA eligible funds, visit the Foundation's website at [www.floridabarfoundation.org](http://www.floridabarfoundation.org).

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print name)

\_\_\_\_\_  
(Date)

**FOUNDATION MEMBERSHIP**

Every member of The Florida Bar, whether in solo practice or in a law firm, who maintains an IOTA account automatically becomes a member of the Foundation, unless declined, (whether or not the member individually maintains client or third-party trust funds).

For Foundation membership records, please enter the full name and Florida Bar attorney number of The Florida Bar member in solo practice, or every Florida Bar member in the law firm: (Use additional sheets as needed).

*LAST NAME* \_\_\_\_\_ *FIRST NAME* \_\_\_\_\_ *MIDDLE INITIAL* \_\_\_\_\_

*ATTORNEY #* \_\_\_\_\_ (Florida Bar #)      M/F (Enter "M" for male or "F" for female)

_____	_____	_____
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RETURN COMPLETED FORM TO

The Florida Bar Foundation  
IOTA Operations Department  
875 Concourse Parkway South, Suite 195  
Maitland, FL 32751

For more information about the IOTA program and the charitable programs it supports, or for assistance in setting up this account, remitting interest or dividends to the Foundation, or handling remittance errors, please visit the Foundation's website at [www.floridabarfoundation.org](http://www.floridabarfoundation.org), or call (407) 960-7000, or (800) 541-2195 (FL), and ask for the IOTA Operations Department.