



**THE FLORIDA BAR
FOUNDATION**

LEADERSHIP AND FUNDING FOR JUSTICE IN FLORIDA

875 Concourse Parkway South
Suite 195
Maitland, FL 32751
407-960-7000 | 800-541-2195
Fax 407-960-3765
www.TheFloridaBarFoundation.org

Notice to Bar Foundation

To complete and submit this form electronically, please visit our website at www.thefloridabarfoundation.org or mail completed form to:
The Florida Bar Foundation IOTA Department 875 Concourse Parkway South, Suite 195 Maitland, Florida 32751

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* _____ (Telephone) *optional* _____

LAWYER/LAW FIRM

FBF USE ONLY

(Name) _____

(Law Firm) *if applicable* _____

(Address) _____

(City) _____ (State) _____ (Zip Code) _____

(Contact) _____ (Telephone) _____ (Email Address) *optional* _____

If 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.thefloridabarfoundation.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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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.thefloridabarfoundation.org, or call (407) 960-7000, or (800) 541-2195 (FL), and ask for the IOTA Department.