

## NEW BUSINESS ACCOUNT CHECKLIST:

# Interest on Lawyer's Trust Account (IOLTA)

- Business Name:**
  - Refer to law firm's entity type for requirements
- Tax Reporting:**
  - EIN of State Law Foundation and
  - TIN for law firm
- ID:** Valid state or government issued ID, SSN and personal information for all signers.
- State Bar Association:** Attorney must be registered with applicable state bar association.
  - Oregon State Bar ([OSB website](#))
  - Washington State Bar ([WSB website](#))
- Minimum Signer Requirements:** Determined by law firm entity type; only registered attorneys can be account signers for Washington IOLTAs.

**Schedule an appointment to open  
your account today at your local branch.**

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