



A Program of the Center for Civic Values

### CENTER FOR CIVIC VALUES NEW MEXICO IOLTA PROGRAM

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Phone: 505.764.9417 or 1.800.451.1941 (statewide), ext. 14  
Fax: 505-242-5179  
E-mail: [IOLTA@civicvalues.org](mailto:IOLTA@civicvalues.org),  
Web: [civicvalues.org](http://civicvalues.org)

TAXPAYER IDENTIFICATION NUMBER (TIN) 85-6018573



CENTER FOR  
CIVIC VALUES  
PROVIDING EDUCATION AND RESOURCES  
FOR PUBLIC PARTICIPATION IN THE LAW

## ATTORNEY NOTICE TO ELIGIBLE FINANCIAL INSTITUTION

I hereby enroll in the Interest on Lawyer Trust Account (IOLTA) program established by the New Mexico Supreme Court. Accordingly, I direct my financial institution to (1) open, if new; *OR*, (2) convert, if existing, my/my firm's pooled client trust account to an to interest bearing IOLTA account in accordance with Rule 24-109 of the Rules Governing the New Mexico Bar.

### ATTORNEY INFORMATION

INSTRUCTIONS TO ATTORNEYS: **(1)** Complete this *Notice*, **(2)** Attach a voided check or deposit ticket to validate the account number; **(3)** Take the *Notice* to an eligible financial institution, **(4) After the account has been opened or converted**, send a copy of this *Notice* to the Center for Civic Values at the address above; and, **(5)** Retain a copy for your records.

Firm Name: \_\_\_\_\_

Attorney Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ E-mail: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Telephone: \_\_\_\_\_

Authorized Signature Lawyer/Law Firm: \_\_\_\_\_

Additional Account Signer(s): \_\_\_\_\_

*(Attach additional sheets if necessary)*

### FINANCIAL INSTITUTION INFORMATION

INSTRUCTIONS TO FINANCIAL INSTITUTIONS: The IOLTA account must be established in the name of the attorney or law firm opening or converting this account, with further designation indicating the fact that this is an IOLTA account. The Taxpayer Identification Number (TIN) must be that of the Center for Civic Values (CCV), shown above. CCV is a tax exempt organization and is exempt from backup withholding. No IRS form 1099 is required for IOLTA accounts opened under this program and the financial institution is not subject to penalty for a mismatched TIN when the payee is an exempt organization. The establishment of interest bearing trust accounts by law firms, including professional corporations, under the IOLTA program has been approved by federal regulatory agencies. Interest as computed in accordance with the applicable disclosures for this account must be remitted monthly or quarterly to CCV at PO Box 2184, Albuquerque, NM 87103-2184. If you wish to transmit interest electronically, please call 505.764-9417 or 800-451-1951, ext. 14.

Financial Institution Name: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

By (financial institution representative): \_\_\_\_\_ Date: \_\_\_\_\_

Account Name: \_\_\_\_\_

Account #

**Please attach voided check or  
deposit slip here.**  
*Thank you.*

COPIES OF THIS *NOTICE* SHOULD BE FILED BY THE ATTORNEY WITH THE FINANCIAL INSTITUTION AND IOLTA