



# THE WEST VIRGINIA STATE BAR

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TO: IOLTA Participating Financial Institution Coordinators

From: The West Virginia State Bar

Date: January 2014

The West Virginia State Bar hopes that you had a wonderful holiday season. As you return to work for the new year, the Bar, first, wants to thank you for all your efforts in 2013 providing the State Bar with information intended to elevate the quality of the IOLTA program. For 2014, The State Bar wants to advise you of several minor changes you may notice.

Primary account management and questions regarding the use of approved forms by both individual accounts and your financial institution will continue to be handled by the State Bar's Finance Director, Sarah Harper-Jones. Questions regarding account management; changes to bank addresses, phone numbers, or primary contact personnel; or related to State Bar forms should be directed to Sarah at [harpers@wvbar.org](mailto:harpers@wvbar.org) or 304-553-7226. Ms. Harper-Jones is assisted with daily account/remittance matters by Cheryl Petty. Ms. Petty can be reached at [cheryl@wvbar.org](mailto:cheryl@wvbar.org) or 304-553-7229. While Ms. Harper-Jones is on maternity leave from, approximately, mid January to mid March, questions should be directed to Ms. Petty.

Questions regarding file openings and/or closings, notification of non-sufficient funds, the use of IOTA accounts by non-lawyers, etc. should be directed to Anita Casey. Ms. Casey can be reached at [caseya@wvbar.org](mailto:caseya@wvbar.org) or 304-553-7228.

The State Bar has established a email address where questions can also be submitted. Ms. Harper-Jones, Ms. Petty and Ms. Casey will all receive emails directed to [IOLTA@wvbar.org](mailto:IOLTA@wvbar.org). If you are not already using this address for submission of monthly/quarterly remittance forms, the State Bar requests that you begin to use this address.

Again, thank you for all your assistance during calendar year 2013. The State Bar looks forward to a long and cooperative relationship with you and your financial institution.