



THE WEST VIRGINIA STATE BAR

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To: IOLTA Participating Financial Institutions

From: The West Virginia State Bar

Date: September 2018

As you aware, our new system has been live since October 2018, and has proved to be a significant improvement over our prior methods of tracking IOLTA remittance data, both for the State Bar and the Participating Financial Institutions. As a reminder, all information, instructions, and trouble-shooting related to reporting IOLTA information from Participating Financial Institutions can be found at <https://wvbar.org/members/iolta/financial-institution-remittance-online/>.

Please continue to follow the proper procedure in closing attorney accounts. As the attorneys do not have the ability to close the accounts in our system, we must rely upon the Participating Financial Institutions to do so. When reporting interest, there is a column called "close date" on the remittance csv file where the date the account was closed should be entered. This only needs to be reported once.

Finally, please take note we have a new Chair of the IOLTA Advisory Committee, Shannon Smith, who can be reached at ssmith@kaycasto.com or 304-225-0970. Please also note that Tyler Shoub is no longer with the State Bar. Feel free to continue to contact the Bar's Director, Anita Casey, at caseya@wvbar.org or 304-553-7228 with any legal questions regarding the IOLTA program.

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