

Pa IOLTA Board
Stephanie Libhart
Outline for CLE (30 mins)

1. What is the IOLTA Board?
2. Pennsylvania Rules of Professional Conduct
 - Rule 1.15 Funds / Qualified and Nonqualified Funds
 - Rule 5.7 Responsibilities Regarding Nonlegal Services
3. IOLTA accounts for a multi-state practice
4. Exclusions and Exemptions
5. Credit Card Deposits into the IOLTA Account
6. Unclaimed Funds in your IOLTA Account
 - New rule effective June 28, 2018
 - Process for remitting / reclaiming
7. Attorney Registration - Reporting your IOLTA Account
8. Civil Legal Aid
 - The IOLTA Board's mission
 - How you can help
9. Q & A