



FREE! TRUST ACCOUNT TRAINING

The Office of Bar Counsel, the Board of Bar Overseers, and participating bar associations (the Massachusetts and Boston Bar Associations) are co- sponsoring a free one-hour program on trust account record keeping. The program will provide guidance for attorneys, paralegals, bookkeepers, or other law office support staff interested in receiving training on the requirements of Mass. R. Prof. C. 1.15.

This program will provide participants with a detailed review of the records required to be maintained for IOLTA accounts and other trust accounts. We will look at record-keeping “traps for the unwary,” including:

- How to maintain your IOLTA account check register and individual client ledgers, either manually or using accounting software, in compliance with the rules.
- How to complete the mandatory “three-way” reconciliation of your IOLTA account and produce the required reconciliation reports.
- How to document the withdrawal of an earned fee from a trust account, including required notification and accountings to clients.
- What transactions are prohibited, including writing checks payable to “cash” and using checks that are not prenumbered.

The program is free, but advance registration is required. To register, please email Tina Fernandes at trustaccounttraining@massbbo.org or call the Office of Bar Counsel at (617) 728-8750 and ask for “trust account program registration.”

Location:

Virtual Live Webinar (interactive)

Time:

Variable - see dates below for specific times.

Upcoming program dates:

- Tuesday, September 10, 2024, from 10:00 - 11:00 a.m. (BBA)
- Thursday, December 5, 2024, from 2:00 - 3:00 p.m. (MBA)
- Wednesday, March 12, 2025, from 10:00 - 11:00 a.m. (BBA)
- Monday, June 2, 2025, from 2:00 - 3:00 p.m. (MBA)