



**OKLAHOMA BAR ASSOCIATION**

1901 North Lincoln Boulevard • P.O. Box 53036 • Oklahoma City, OK 73152-3036  
Membership Department • 405 / 416-7000 • FAX 405 / 416-7001

**OBA TRUST ACCOUNT REPORTING**

Rule 1.15(j) - (m) of the Oklahoma Rules of Professional Conduct (ORPC), 5 O.S. 2011, ch. 1, app. 3-A

\_\_\_\_\_  
*FULL NAME*

\_\_\_\_\_  
*BAR NUMBER*

\_\_\_\_\_  
*STREET ADDRESS / PO BOX*

\_\_\_\_\_  
*CITY*

\_\_\_\_\_  
*STATE*

\_\_\_\_\_  
*ZIP CODE*

\_\_\_\_\_  
*Phone*

\_\_\_\_\_  
*E-Mail*

Please update my roster information to the above.

.....  
**Please ADD \_\_\_\_ or REMOVE \_\_\_\_ the following account to/from my profile.**

**Date Opened** \_\_\_\_\_

**Date Closed** \_\_\_\_\_

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

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Account #

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

This account IS IOLTA

This account IS NOT IOLTA

IOLTA in What State? \_\_\_\_\_

.....  
**Please ADD \_\_\_\_ or REMOVE \_\_\_\_ the following account to/from my profile.**

**Date Opened** \_\_\_\_\_

**Date Closed** \_\_\_\_\_

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

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Account #

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

This account IS IOLTA

This account IS NOT IOLTA

IOLTA in What State? \_\_\_\_\_