

Checklist of Attachments

Please ensure that each document marked in the table below is enclosed with the completed application package. If practical, please send as electronic files (for example, PDF files). If documents have to be sent in hard-copy format, send them directly to the Lawyers Trust Account Board at the mailing address indicated on the cover page of this application. **Documents that are mailed via FedEx must be addressed to the physical office address as FedEx will not deliver to a post office box address.**

Enclosed:	Additional Attachments as follows:	Attachment Letter:
_____	Signed Assurances Page <i>(form attached)</i>	A
_____	Board Members List.....	_____
_____	Case Acceptance and Client Eligibility Guidelines	_____
_____	Audited financial statements for the two most recently completed fiscal years <i>(For programs operating on a Calendar Year, please submit audits for CY2007 and CY2008. For programs operating on a Fiscal Year, please submit audits for FY2008-2009 and FY2007-2008)</i>	_____
_____	Copy of cover page from your organization's professional liability and malpractice coverage	_____
_____	Resumes of program's executive director and litigation director (or equivalent)	_____

Organizations that have not already been determined by the Pennsylvania Interest on Lawyers Trust Account Board to be an IOLTA-qualified recipient organization, should submit the following additional documents:

_____	IRS 501(c)(3) determination letter	_____
_____	Form 990 for the two most recently completed fiscal years	_____
_____	Copy of the corporation's articles of incorporation	_____

Attachment A

ASSURANCES GIVEN BY APPLICANT AS CONDITION FOR RECEIPT OF AN IOLTA GRANT

(Applicant Name)

Applicant assures that:

1. *It will restrict the use of IOLTA funds to law-related activities or purposes that are charitable or educational within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1954, and will not use IOLTA grant funds for any prohibited purposes.*
2. *It will comply with applicable laws pertaining to anti-discrimination measures for employment and services.*
3. *It will, upon request, cooperate with all data collection and evaluation activities undertaken by the PA IOLTA Board and give any authorized representative of the Board access to any copies of all financial records, books, papers, or documents, provided that the Board shall not have access to any reports, records, or information subject to the attorney-client privilege.*
4. *It understands and agrees that the Board may, in its sole discretion, grant funds in greater or lesser amounts and/or for greater or lesser periods of time than requested in this application.*
5. *It understands and agrees that the application, once received by the Board, becomes the property of the Board, and any or all ideas contained therein may be used by the Board.*
6. *It will provide, upon request, periodic written reports detailing the use of IOLTA funds in light of the proposed use described in the grant application.*
7. *It will promptly notify the IOLTA Board if any organizational or programmatic changes occur such that information contained in its grant application is no longer correct, or that would render the organization ineligible for an IOLTA grant.*

I have read these assurances and understand that if this application is approved for funding, the grant will be subject to these assurances. I certify that the applicant will comply with these assurances if the application is approved.

Program Director: _____

Board Chairperson: _____

Signature: _____

Signature: _____

Date: _____

Date: _____