

# Annual Filing of Pro Bono Legal Service Report and IOLTA Compliance Report

## PLEASE NOTE

We encourage all attorneys to schedule *recurring* appointments on your own calendars with for **July 10** of every year. Set them up with pop-up reminders, include the [MDCourts.gov](http://MDCourts.gov), and make sure they automatically renew (like holidays). This will allow *four weeks* to comply before the **September 10 deadline**. You do not need to have received the email notification from the Courts first. (As there is a **\$50 recertification fee**, consider this a money-saving tip.)

## FILING REPORTS

[Rule 19-503 \(formerly 16-903\)](#) provides that all lawyers licensed to practice law in the State of Maryland are required to fulfill two important reporting requirements each year. These reports are mandatory *regardless* of whether any pro bono service has been provided or whether any IOLTA funds are maintained. Failure to comply with the Pro Bono or IOLTA reporting requirement can result in decertification from the practice of law in this state.

Rule 19-503 was *amended* in December 2018 to require Maryland lawyers to register with the [Attorney Information System](#) (AIS), and to permit the creation of a single compliance schedule so that reporting is done on a fiscal basis. Attorneys will receive an email notification once per year, in July, advising that the **Client Protection Fund assessment and Pro Bono and IOLTA reports are all due September 10**. (For 2019 only, reports will reflect the prior 18 months.)

1. Go to [www.MDCourts.gov](http://www.MDCourts.gov)
2. Hover over the word **LAWYERS** in the ribbon at the top of the page, and click on Attorney Information System. Log in and follow the steps provided for reporting.
3. **These directions will be updated once the reporting system is live and we have had a chance to walk through every step ourselves. I apologize for the delay, but this will happen long before July 10.**

Additional information can be found here: [www.MDCourts.gov/probono/faqs.html](http://www.MDCourts.gov/probono/faqs.html).

## CONFIRMING SUBMISSION

1. **These directions will be updated once the reporting system is live and we have had a chance to walk through every step ourselves. I apologize for the delay, but this will happen long before July 10.**

## HELP WITH REPORTING VIA PRO BONO RESOURCE CENTER

Email [reporting@probonomd.org](mailto:reporting@probonomd.org) or call Elizabeth at 443-703-3045. For *IOLTA-specific* questions, call 410-576-9494.

## UPDATING CONTACT INFORMATION

It is each attorney's responsibility to maintain current contact information with the Client Protection Fund at all times. You can do so *online* through the new **ATTORNEY INFORMATION SYSTEM (AIS)**, accessible through the judiciary website, at: [www.MDCourts.gov/lawyers/AIS](http://www.MDCourts.gov/lawyers/AIS). *If absolutely necessary*, you can write a letter on your *own* letterhead or else print CPF's form ([www.MDCourts.gov/CPF/forms](http://www.MDCourts.gov/CPF/forms)) and *fax* it directly to 410-897-0555. If you need to *mail* your update, that address is: Client Protection Fund, 200 Harry S. Truman Pkwy, Suite 350, Annapolis, MD 21401 (also provided on the form).

## PAYING ANNUAL MEMBERSHIP DUES TO THE CLIENT PROTECTION FUND (CPF)

Please pay *online* by logging into [AIS](#). You can *mail* your check to the CPF (address above). Dues are invoiced in July and may be charged a *late* fee after **September 10**.

## REGARDING THE LETTER REQUESTING YOUR FEDERAL TAX ID

If you received a letter requesting your Federal Tax ID number, please log into AIS to provide that information (or clarify that you don't have one). If you have any additional questions, contact the CPF directly at 410-630-8140.

# Annual Filing of Pro Bono Legal Service Report and IOLTA Compliance Report

## Every Attorney's To-Do List

### Three Things ...

There are three important but relatively easy things **every attorney must do each year** in order to stay certified to practice law in the State of Maryland:

### 1. File the Pro Bono Legal Service Report

Lawyer Pro Bono Legal Service Reports must be filed annually with the Administrative Office of the Courts (AOC) **by September 10**. Under Rule 19-503 (*formerly Rule 16-903*), reports for a given year will be **emailed** to all lawyers on the Maryland Client Protection Fund list no later than July 10 of the following year. Reports may be filed at [www.MDCourts.gov/lawyers/AIS](http://www.MDCourts.gov/lawyers/AIS) regardless of receipt of the mailing.

Rule 19-306.1 (*formerly Rule 6.1*) of the Rules of Professional Conduct governing the rendering of pro bono legal service includes a definition of pro bono service and an annual "aspirational" goal of 50 hours of service for lawyers in the full-time practice of law. The Rule also contains a provision permitting a lawyer to make a financial contribution to a legal services organization in lieu of such service. Please note that pro bono service is still voluntary – it is only the reporting of the service that is mandatory. Even if you did not provide pro bono legal service in a given calendar year, you must report that. The Court recommends that you visit the judiciary's website to review the Rule and a list of Frequently Asked Questions about the reporting requirement and what qualifies as pro bono service. You may also contact the statewide Standing Committee on Pro Bono Legal Service at: [reporting@probonomd.org](mailto:reporting@probonomd.org).

### 2. File the IOLTA Compliance Report

The IOLTA Compliance report also must be filed annually with the AOC **by September 10**, and can also be filed online at [www.MDCourts.gov/lawyers/AIS](http://www.MDCourts.gov/lawyers/AIS). From the letter by the Hon. Mary Ellen Barbera, sent to all Maryland attorneys in good standing:

The IOLTA reporting requirement is intended to strengthen uniform compliance with the mandatory program and capture all of the IOLTA-eligible trust funds. IOLTA revenues administered by the Maryland Legal Services Corporation (MLSC) constitute one of our State's principal funding sources for the provision of civil legal services to our low-income population. Your IOLTA Report should reflect IOLTA accounts in existence as of the date you complete the report. Even if you do not have an IOLTA account you still must comply with the Rule by filing. More information on MLSC and the IOLTA program is available at the MLSC website: [www.mlsc.org](http://www.mlsc.org).

### 3. Pay Client Protection Fund Dues

Pay annual Client Protection Fund Dues **by September 10** (log in to [www.MDCourts.gov/lawyers/AIS](http://www.MDCourts.gov/lawyers/AIS)). Per the Regulations of The Client Protection Fund of The Bar of Maryland, paragraph (i)(10):

Payment of mandatory assessments must be received by the Fund on or before the due date. No late fee will be assessed until after August 31. To avoid an additional late fee, any balance due must be received by December 31. December admittees who are billed for the full fiscal year assessments are allowed a due date of March 31 of the following year to avoid a late fee.

**Maintaining compliance is as easy as 1, 2, 3 ... do it online, on time!**

For reporting assistance or more information,  
contact Elizabeth Grove at the [Pro Bono Resource Center](http://www.ProBonoResourceCenter.org) of Maryland:  
[reporting@probonomd.org](mailto:reporting@probonomd.org), 443-703-3045.