

OHIO LEGAL ASSISTANCE FOUNDATION



OHIO'S IOLTA/IOTA PRIME PARTNER PROGRAM *2012 Financial Institution Application*

February 2012

Introduction

The mission of the Ohio Legal Assistance Foundation is to ensure that basic civil legal services are available to Ohio residents who cannot afford to pay a lawyer. The Foundation has adopted its **Prime Partner Program** to give public recognition to financial institutions that assist in fulfilling this mission. Our **Prime Partner Program** offers financial institutions a unique opportunity to distinguish themselves as leaders in Ohio's IOLTA/IOTA Program. Prime Partners will be recognized on the Foundation and Ohio State Bar Association (OSBA) websites, at the OSBA annual convention, and through dialogues with lawyers seeking out financial institutions that support lawyers' ethical commitments to legal services in Ohio.

This brief application will help the Foundation to identify those financial institutions that qualify as **Prime Partners**. Foundation staff will use the information provided in the application as well as the information provided in the monthly remittance report to score each financial institution based on several overarching categories: a proven commitment to optimizing the IOLTA/IOTA Program through premium interest rates; a demonstrated commitment to civil legal services by providing volunteers and/or board members to legal aid; donation of resources to legal aid clinics or other community efforts; and by any other efforts which promote access to justice in Ohio.

Financial institutions that score above the average will be placed on the Foundation's **Prime Partner Program's** "Honor Roll." The top ten percent (10%) of the Honor Roll institutions will be recognized as "**Prime Partners**."

Questions about the Prime Partners Program or this application should be directed to Jane Taylor, Associate Director for Pro Bono and Communications, primepartner@olaf.org or 614.728.6931.

APPLICATION INSTRUCTIONS:

1. Complete the application by hand-writing responses on a printed version or use a fill-in PDF version of the application, which can be downloaded from the Foundation's website :
www.olaf.org/iolta-and-iota/prime-partners-program/
2. Responses should include activities in calendar year 2011 only.
3. Do not leave response fields empty; if you do not have anything to report, use "N/A," "not applicable" or other similar response.
4. If additional space is required, you may attach additional pages.
5. An authorized representative of the financial institution **MUST SIGN** page 4.
6. A contact person for the Prime Partner Program must be designated on page 4 of the application.
7. Completed applications must be postmarked or email date stamped by Friday, March 30, 2012.
8. Applications may be submitted on paper or by email to the following address:

Ohio Legal Assistance Foundation
Prime Partner Program – Application
10 West Broad Street, Suite 950
Columbus, Ohio 43215-3483

primerpartner@olaf.org

*** The Foundation will consult with designated Prime Partners for consent, in advance of any release of specific information about the financial institution.**

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Financial Institution: _____

Limit responses to activities that have occurred during the past calendar year (January 2011 to December 2011). If you require additional space please attach additional pages.

1	Charitable Giving in Support of Ohio's Legal Aid Programs	
	a) Summarize your financial institution's charitable giving activities in the state of Ohio targeted specifically to legal aid programs providing civil legal services to low-income individuals.	
	b) Total cash donated in support to legal aid programs:	\$
	c) Total dollars invested (i.e. loans, lines of credit, etc.) in legal aid programs:	\$
	d) Community Reinvestment Act credits sought for investment in legal aid programs:	\$
	e) Other charitable giving in support of legal aid programs:	\$
Please use the following space to explain in any additional detail, you would like to provide.		

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2	Employee Involvement with a Legal Aid Program(s)	
	Identify the number of employees who:	
	a. Serve(d) on a legal aid program board of trustees.	
	b. Participated in a pro bono activity sponsored by a legal aid program.	
	<i>Pro bono means providing free legal assistance to persons of limited means who are unable to afford such assistance or to charitable organizations that may not be able to afford to pay for legal services.</i>	
c. Describe how your employees volunteered their time at a legal aid program, if other than serving on a board or participating in a sponsored pro bono activity.		
<p>(You are not required to identify employee-volunteers by name; however, we welcome your recognition of these employees should you choose to do so.)</p>		

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4	Institutional support for the IOLTA/IOTA Program
	<p>How has your financial institution structured its IOLTA and IOTA account products to ensure the efficient and effective participation in the IOLTA/IOTA program?</p> <p><i>Your response should highlight the role of senior leadership, product managers, in-house counsel and staff from your legal office or outside firm, and others in promoting the IOLTA/IOTA Program within your financial institution. As well, your response should highlight how there is a general level of awareness and support throughout the financial institution from senior management to the front-line staff member working directly with IOLTA and IOTA account-holders.</i></p>

I certify that the information provided in this application is accurate and reflects the most recent information available regarding my financial institution.

Authorized Representative of the Financial Institution

Signature: _____
Name (printed): _____
Title: _____
Date: _____

Prime Partner Program Contact

Name: _____
Title: _____
Address: _____
Phone Number: _____ Email Address: _____