



**THE STATE BAR  
OF CALIFORNIA**

180 HOWARD STREET, SAN FRANCISCO, CA 94105-1639

**OFFICE OF PROFESSIONAL COMPETENCE**

**PLANNING, AND DEVELOPMENT**

TELEPHONE: (415) 538-2167

**M E M O R A N D U M**

**DATE:** March 10, 2015

**TO:** Members of the Board's Regulation & Discipline Oversight Committee

**FROM:** Randall Difuntorum, Director, Professional Competence Programs

**SUBJECT:** RAD Meeting on March 12, 2015 – Client Trust Accounting Survey

---

For the discussion of open agenda item IV.A (Client Trust Accounting Survey/Education), this memorandum provides the URL for the draft client trust accounting survey. The draft survey can be accessed at this site:

[https://fs16.formsite.com/SB\\_RRC/form77/index.html](https://fs16.formsite.com/SB_RRC/form77/index.html)

When viewing the questions in the survey, please note that there are conditional questions, so in order to see most of the questions, you would need to answer that you are a lawyer employed in private practice and that you personally handle a currently open IOLTA account and also a currently open non-IOLTA account.

If you have any questions, please contact me at (415) 538-2161.