

SUPREME COURT OF VERMONT  
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TO: Members of the Vermont Bar

FROM: Lee Suskin, Court Administrator

RE: Information Regarding Trust Accounts from the Professional  
Responsibility Board

DATE: January 5, 2009

For your information, I enclose the following:

The Vermont Professional Responsibility Board has prepared a booklet entitled "[Managing Client Trust Accounts, Rules, Regulations and Tips](#)" as a guide for both new and experienced lawyers in dealing with trust accounting questions. The purpose is to provide attorneys with the basic rules, highlight the areas that will always require an attorney's best judgment because there are no absolute rules, and dispense some practical experience provided by years of answering lawyers' questions. If you are an attorney and you are dealing with trust accounts and questions arise, please do not hesitate to call the Professional Responsibility Program at 802-859-3000 or 802-828-3204.

The Professional Responsibility Board has also developed and recently revised a [Trust Account Questionnaire](#) that is now available online. The questionnaire is intended to serve as a tool to which Vermont attorneys can turn for self-assessment of the procedures by which their trust accounting systems are managed. The questionnaire is the result of several years of input from the Professional Responsibility Board, Bar Counsel, Disciplinary Counsel, and Certified Public Accountants. Completion of the questionnaire is not a substitute for complying with the Vermont Rules of Professional Conduct. However, the questionnaire provides a starting point for self-education on trust account management.

Rule 1.15C(b) of the Vermont Rules of Professional Conduct requires members of the Vermont Bar to maintain their trust accounts only in financial institutions approved by the Professional Responsibility Program. Financial institutions which have not been so approved may obtain information as to how to become certified by contacting the Office of Disciplinary Counsel (802) 859-3000. For a complete list of Approved Financial Institutions, please click on the following link: <http://www.vermontjudiciary.org/Committees/prbrules/attytrust.aspx>.

## **II. OTHER REMINDERS**

Attorneys are reminded of their obligation under A.O. 41 to keep this office informed of their current mailing and email addresses.

You may send changes to [JUD-AttyLicensing@state.vt.us](mailto:JUD-AttyLicensing@state.vt.us). Your cooperation is very much appreciated.