



Would you like to avoid BBO Disciplinary Admonitions for a Trust Account violation of Mass. R. Prof. C. 1.15?

Facts:

- If the trust account is mismanaged in a manner that was preventable, the attorney will be found responsible even if a secretary or bookkeeper was actually doing the record keeping and may be subject to a BBO audit.
- A trust account cannot simply be delegated to a staff person untrained in trust account record keeping.
- The lawyer is responsible to insure that the staff person is actually maintaining the records properly, that the receipts and disbursement journal and subsidiary ledgers are being kept up to date. (We do that for you)
- Reconciliation insures that any inadvertent error – an arithmetic mistake, a deposit check mistakenly not deposited – will be found within a month, and with luck, before problems (think bounced checks) occur.



Contact Us Today!

We help keep you out of 'hot water'!

The staff at Bakken CPA PC is trained in Trust Account Mass. R. Prof. C. 1.15 requirements. We set up, maintain and prepare the required '3 way' reconciliations for IOLTA Trust Accounts for attorneys. We have helped attorneys being audited by the BBO (Board of Bar Overseers) bring their accounts into compliance and we work with attorneys wishing to avoid being audited by the BBO. Don't wait until it's too late to comply.