

FROM FARMS... TO HIGH RISES

BUILDING ON A STRONG FOUNDATION



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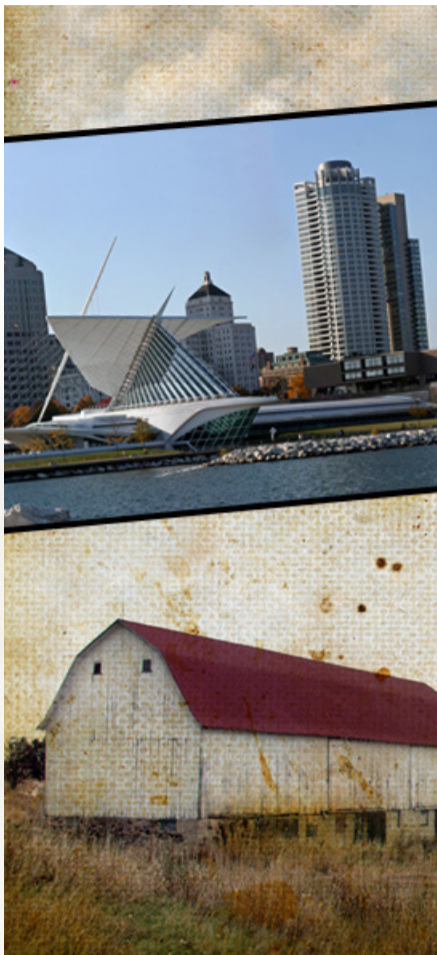
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Greetings friends and colleagues,

It is my pleasure to share with you the Wisconsin Trust Account Foundation's 2013 Annual Report: *From Farms to High Rises – Building on a Solid Foundation*.

While a review of the past year's events is again characterized by economic uncertainty, one thing remains unchanged – the rock solid commitment of WisTAF grantees in their mission to provide civil legal services to Wisconsin residents with the greatest need.

At the close of 2013, WisTAF's IOLTA net interest yield hovered near 0.09 percent, down from about 0.1 percent a year ago. Rates aren't expected to rise in the near future as the Federal Reserve has indicated its plan to hold the federal funds rate at its present level (0 to 0.25 percent) for the foreseeable future. Industry experts report that bank deposits remain high as demand for consumer and business loans continues to languish, a factor contributing to interest rate stagnation.

WisTAF grants continue to be anchored by funds contributed annually to the Public Interest Legal Services Fund (PILSF) by Wisconsin's attorneys and judges. This source has now become the mainstay of annual grant awards. However, the WisTAF Board, in collaboration with the Wisconsin Access to Justice Commission, seeks to add building blocks to the grant funding mix by pursuing additional potential stable revenue streams.

While the Foundation has been able to maintain a stable grant distribution by dipping into its reserves, it is anticipated that, barring a miraculous increase in IOLTA income or the addition of new funding sources, these reserves will run out by the end of 2015.

WisTAF Grantees: A Solid Foundation

Current WisTAF grantees have a combined total experience of *more than 350 years* of serving low-income Wisconsinites with their legal problems. This impressive figure points to the dedication and competence with which these legal professionals have long turned ideals into action. Assisting survivors of domestic violence, families facing wrongful evictions, and people with disabilities trying to secure health care benefits are only a few of the issues targeted by WisTAF grantees' tireless efforts to make sure justice is accessible to all.

In 2013 WisTAF awarded grants to 15 civil legal aid programs across the state. Grant disbursements totaled approximately \$1.4 million and were used to assist families and individuals in all 72 Wisconsin counties. WisTAF grantees have demonstrated their resilience, creativity, and adaptability as funding sources have been built up, scaled back and, in some cases, demolished by ever-changing economic and political climates. WisTAF is proud to support the efforts of these amazing programs.

As my time on the WisTAF Board of Directors expires, I wish to offer my heartfelt thanks to my fellow Board Members, WisTAF staff, WisTAF grantees, and legal & banking profession partners.

Joel Bailey, *President*

2013 Board of Directors

President

Mr. Joel Bailey – Janesville

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Ms. Denes Tobie – Madison

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Wisconsin Trust Account Foundation, Inc.

Who We Are

The Wisconsin Trust Account Foundation, Inc. (WisTAF), a 501(c)(3) nonprofit corporation, was created in 1986 by the Wisconsin Supreme Court to administer funding for civil legal aid for low-income residents of Wisconsin. WisTAF brings Wisconsin's legal and financial communities together to generate funds which are used to make grants to nonprofit organizations providing civil legal services to Wisconsin's most vulnerable residents. Families and individuals throughout the state receive the legal help they need to deal with issues such as escaping domestic violence and abuse, home foreclosure, bankruptcy, illegal eviction, and obtaining the medical benefits they are due, to name just a few. Grant money also funds law-related services such as legal education, indirect legal services or other community services approved by the Wisconsin Supreme Court.

Over the past quarter of a century, WisTAF has granted more than \$43 million to organizations working toward the Foundation's vision of equal access to justice, regardless of income. WisTAF administers the following funds:

Interest on Lawyers' Trust Accounts (IOLTA) Program

The IOLTA program allows attorneys to pool short-term or nominal deposits made on behalf of clients or third parties into one account. The interest generated by these accounts is remitted to WisTAF for use in grantmaking. The commitment of financial institutions to the communities they serve is reflected in their participation in the IOLTA program. In addition to paying competitive interest rates on lawyers' trust accounts, many financial institutions have chosen to waive fees on IOLTA accounts, resulting in a direct increase in the dollars available to help fund legal services. To date, IOLTA funding has resulted in nearly \$31 million in grant awards for dozens of Wisconsin's civil legal service providers.

Public Interest Legal Services Fund (PILSF)

In 2005, the Wisconsin Supreme Court established the Public Interest Legal Services Fund (PILSF) in response to the state's growing need for civil legal services and to supplement IOLTA funding with a more stable revenue source. PILSF funds are directly attributable to Wisconsin's attorneys and judges, and are distributed throughout the ten state judicial districts. Since its inception, PILSF funds have helped low-income people in all Wisconsin counties.

Wisconsin Equal Justice Fund, Inc.

WisTAF is honored to disperse annual grants funded by the Wisconsin Equal Justice Fund, Inc. (WEJF) – a nonprofit agency formed by attorneys to help increase funding for Wisconsin's civil legal services programs. Individual attorneys, law firms, Wisconsin corporations and non-attorney individuals support WEJF's members through donations and the annual Howard B. Eisenberg Lifetime Achievement Award Dinner in Milwaukee.

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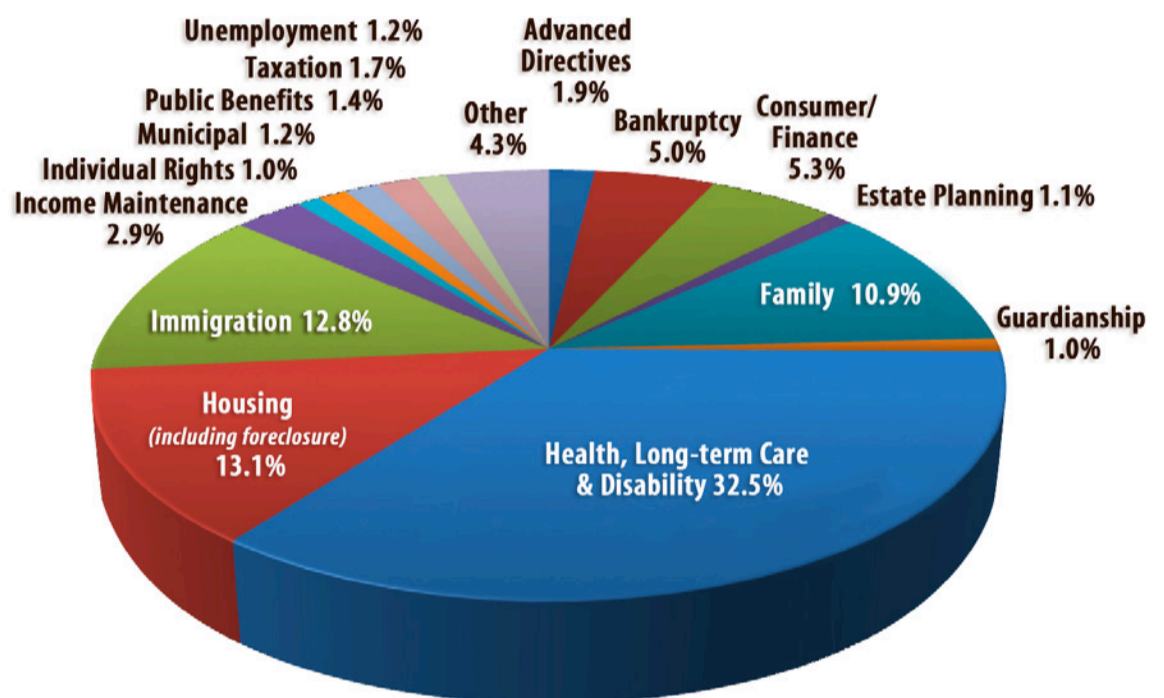


Legal Aid Changing Lives

Who Benefits?

In 2013, legal aid organizations made a significant difference in the lives of Wisconsin's low-income residents who had nowhere else to turn for help with their civil legal needs. At the same time Wisconsin's poverty population is increasing, state and federal funding for legal aid and interest rates on IOLTA accounts continue to fall. Thousands of individuals and families who desperately need legal help with issues involving domestic violence, home foreclosures, and veterans benefits, to name a few, are finding they have nowhere to turn. Following is a snapshot of the services provided by WisTAF grantees in 2013, along with real-life examples of people who were helped by legal aid.

Types of cases closed by WisTAF grant recipients in 2013



Legal aid helps preserve health care coverage.

ABC for Health attorneys worked with “Kelsey” after she received a bill for over \$200,000 after a critical heart surgery. Kelsey thought she had BadgerCare Plus Core Plan coverage that had been correctly renewed shortly before surgery. Following discharge from the hospital, Kelsey learned that her coverage had been terminated without her knowledge. ABC attorneys argued at the fair hearing that the notices Kelsey received were inaccurate and confusing and that Kelsey had met the requirements for continuing coverage. The hearing officer agreed the denial was incorrect and ordered Kelsey’s benefits retroactively reinstated freeing Kelsey from potentially debilitating and life-altering debt.

ABC for Health – Madison

Legal aid helps prevent homelessness.

“Anna” is a domestic violence survivor who made the move from a domestic abuse shelter to permanent supportive housing. However, only months after moving in, she faced the threat of an unwarranted eviction which would mean homelessness. Although she had been in this supportive housing program for several months, Anna was not receiving the case management services the landlord was required to provide. Legal Action of Wisconsin represented Anna and settled the case – keeping her in her permanent supportive housing and obtaining the case management services to which she was entitled.

Legal Action of Wisconsin – Milwaukee

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A Solid Foundation of Quality Legal Service Provision

In 2013, WisTAF distributed over \$1.45 million to 15 legal services organizations. While the funding is significant, it is woefully inadequate in addressing the estimated \$30 million-plus that would be needed *each year* to meet the civil legal service needs of Wisconsin's low-income families.

The following 2013 grant recipients continue to share their dedication, skill, and innovation in providing legal services to the most vulnerable members of our society in the face of these challenging economic times.

ABC (Advocacy and Benefits Counseling) for Health, Inc. is a nonprofit public interest law firm serving families throughout Wisconsin on legal issues related to health care access and financing.

AIDS Network provides advocacy, legal assistance and referrals to help persons with HIV/AIDS find access to public benefits, housing, medical benefits/access to medical care, family law and other legal issues.

AIDS Resource Center of Wisconsin provides help to individuals and families living with HIV/AIDS, so they can find the legal help they need to live with dignity.

Catholic Charities of the Archdiocese of Milwaukee, Inc. is a nonprofit charitable organization serving over 13,000 families annually in the areas of Adult, Family & Children, and Social Ministries.

Catholic Charities of the Diocese of La Crosse, Inc. provides programming in the areas of immigration services, emergency support services, adoption services, financial counseling, domestic abuse services, services for children with disabilities, and ministries including the HIV/AIDS Ministry Project.

Center Against Sexual and Domestic Abuse (CASDA) provides free services to individuals hurt by domestic, sexual or child abuse, as they advocate for a community effort to end violence.

Centro Legal por Derechos Humanos is a nonprofit corporation whose primary purpose is to provide legal representation to the poor and those with limited resources for a reasonable and accessible price in the Milwaukee area.

Community Justice, Inc. is a nonprofit corporation that provides legal services to Madison-area low-income families and individuals on a sliding-fee scale based on federal poverty guidelines.

Disability Rights Wisconsin defends the rights of people residing in Wisconsin's public and private institutions, and represents individuals under the Americans with Disabilities Act through information and referral, direct legal representation, and in limited situations, class action litigation.

Door County Legal Aid Society is a volunteer organization that operates primarily as a screening and referral source to coordinate legal services through local pro bono attorneys.

Kids Matter Inc. provides legal services and other advocacy for children in foster and kinship care in the greater Milwaukee area.

Legal Action of Wisconsin, Inc. serves low-income clients in the areas of family law and domestic violence, housing, public benefits, special education and economic development.

Legal Aid Society of Milwaukee provides family law, public benefits, landlord-tenant, consumer, municipal ordinance defense and civil rights law to low-income people in Milwaukee.

Portage County Legal Aid Society is a volunteer attorney legal service that addresses the need for pro bono civil legal services for indigent persons in Portage County.

Wisconsin Judicare, Inc. provides civil legal services to nearly 3,000 low-income northern Wisconsin residents each year with the help of 400 private practice attorneys and eight staff attorneys.

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January 1 through December 31, 2013

	IOLTA	PILSF	Cy Pres	WEJF	Total
ABC for Health, Inc.	-0-	50,000	-0-	-0-	50,000
AIDS Network	-0-	12,000	-0-	-0-	12,000
AIDS Resource Center of Wisconsin	-0-	12,000	-0-	-0-	12,000
Catholic Charities of the Archdiocese of Milwaukee, Inc.	-0-	10,000	-0-	-0-	10,000
Catholic Charities of the Diocese of La Crosse, Inc.	-0-	10,000	-0-	-0-	10,000
Center Against Sexual & Domestic Abuse, Inc.	-0-	15,000	-0-	-0-	15,000
Centro Legal por Derechos Humanos	-0-	22,000	-0-	-0-	22,000
Community Justice, Inc.	-0-	15,000	-0-	-0-	15,000
Disability Rights Wisconsin	-0-	104,000	-0-	25,400	129,400
Kids Matter, Inc.	-0-	10,000	-0-	-0-	10,000
Legal Action of Wisconsin, Inc.	276,400	426,400	67,900	79,634	850,334
Legal Aid Society of Door County	-0-	6,000	-0-	-0-	6,000
Legal Aid Society of Milwaukee	-0-	104,000	-0-	-0-	104,000
Portage County Legal Aid Society	-0-	10,000	-0-	-0-	10,000
Wisconsin Judicare, Inc.	73,600	113,850	18,100	21,966	227,516
Totals	350,000	920,250	86,000	127,000	1,483,250

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2013 Prime Partners

Calumet County Bank
Citizens Bank of Mukwonago
Commerce State Bank
Farmers State Bank Hillsboro
First Bank Financial Centre
First Business Bank Madison
First Business Bank
Milwaukee
First National Bank
of Hartford
Home Savings Bank
Mound City Bank
Peoples State Bank
Prairie du Chien
PNC Bank
River Valley Bank
State Bank Financial

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WISTAF PARTNERS

A COLLABORATION FOR EQUAL ACCESS TO JUSTICE

Financial institutions provide the substance of the IOLTA program. Their commitment to the communities they serve is reflected in their participation in IOLTA – and to an even greater degree, by those electing Prime Partner status.

Prime Partner Financial Institutions

Membership in the Prime Partner program allows banks to fulfill the corporate value of *supporting the community*. And, Prime Partners understand that a stronger community is good for business.

Prime Partner institutions are IOLTA participating financial institutions that, during 2013, have gone above and beyond IOLTA participation requirements by choosing to pay interest rates on IOLTA accounts that are at least 50 basis points (0.50 percent) higher than required under the Wisconsin Supreme Court's IOLTA interest rate comparability requirement.

Other IOLTA Participating Financial Institutions

Nearly 230 financial institutions maintained IOLTA accounts in 2013 – many of which generously waived service fees, allowing 100% of the interest earned to go directly to their neighbors in need. A full listing of eligible IOLTA participating financial institutions can be found on our Web site at www.wistaf.org.

Summarized Financial Information

Statement of Financial Position

Assets	2013*	2012
Total Current Assets	\$ 863,727	\$ 916,638
Fixed Assets	\$ 770	\$ 1,542
Investments	<u>\$1,217,305</u>	<u>\$1,275,398</u>
Total Assets	\$2,081,802	\$2,193,578
Liabilities and Net Assets		
Total Liabilities	\$ 0	\$ 0
Total Net Assets	<u>\$2,081,802</u>	<u>\$2,193,578</u>
Total Liabilities and Net Assets	\$2,081,802	\$2,193,578

Statement of Activities

Revenues	\$1,612,192	\$1,850,329
Expenditures		
Grants Awarded	\$1,483,250	\$1,433,450
Support Expenses	<u>\$240,718</u>	<u>\$238,308</u>
Total Expenditures	\$1,723,968	\$1,671,758
Increase (Decrease) in Net Assets	\$ (111,776)	\$ 178,573
Net Assets – Beginning of Period	<u>\$2,193,578</u>	<u>\$2,015,005</u>
Net Assets – End of Period	\$2,081,802	\$2,193,578

**These are audited figures for the period ending December 31, 2013. Audit available upon request.*

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Citizens Bank of Mukwonago
Commerce State Bank
Farmers State Bank Hillsboro
First Bank Financial Centre
First Business Bank Madison
First Business Bank
Milwaukee
First National Bank
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Home Savings Bank
Mound City Bank
Peoples State Bank
Prairie du Chien
PNC Bank
River Valley Bank
State Bank Financial

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Our Mission

The Wisconsin Trust Account Foundation, Inc. (WisTAF) is dedicated to equal access to the civil justice system, funding legal services for low-income persons through the fair and effective administration of Interest on Lawyers' Trust Accounts (IOLTA), Public Interest Legal Services Fund (PILSF), State of Wisconsin Low-Income Civil Legal Services Appropriation, and other sources.

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