

[Home](#)

[President's Message](#)

[Who We Are](#)

[Who Benefits?](#)

[WisTAF Grantees](#)

[Schedule of Grants](#)

[WisTAF Partners](#)

[Financial Information](#)

[Our Mission](#)

A young green plant with three leaves grows out of a large pile of silver coins. A hand is shown pouring water from a small container onto the base of the plant. In the background, there are faint images of a family (a man, a woman, and a child) and an elderly woman smiling.

Growth begins with a seed.

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Home

President's Message

Who We Are

Who Benefits?

WisTAF Grantees

Schedule of Grants

WisTAF Partners

Financial Information

Our Mission

President's Message

Greetings friends and colleagues,

I am pleased to present the Wisconsin Trust Account Foundation's 2015 Annual Report: ***Growth Begins With A Seed.***

Since its inception in 1986, the Wisconsin Trust Account Foundation (WisTAF) has provided civil legal services funding totaling more than \$46 million to organizations working toward the Foundation's vision of equal access to justice throughout Wisconsin.

In its earliest years, the Interest On Lawyers Trust Accounts (IOLTA) program provided the seed money for WisTAF's grant program. This primary grant funding source has been supplemented by additional revenue from sources such as the Public Interest Legal Services Fund (PILSF), state appropriations for civil and domestic abuse legal services, private donations and various cy pres and pro hac vice awards. This steady diversification of funding sources proved invaluable when the Great Recession decimated the IOLTA program in 2009.

While that recession has receded, the Federal Funds Rate – and driver of IOLTA interest rates and revenue – has remained at a historic low range of 0.0 to 0.25 percent for seven consecutive years. While the Federal Reserve inched that range upward a notch, setting it at 0.25 to 0.50 percent in December 2015, interest rates paid on Wisconsin's IOLTA accounts continue to lag – with an average net yield of 0.08 percent at the close of the year.

Despite dormant interest rates, WisTAF remains Wisconsin's largest private funding source for civil legal aid programs. Together with our legal and financial community partners, we continue to work diligently toward our mission of ensuring that low-income residents of Wisconsin have access to information, advice and representation in non-criminal legal issues. To that end, WisTAF awarded grants to 15 civil legal aid programs spanning the state in 2015. Grant disbursements exceeded \$1.4 million and were used to aid children, women and men in all 72 Wisconsin counties.

2016 promises grant award growth as Wisconsin was one of three jurisdictions receiving new state legislative funding for legal aid last year. The state appropriation of \$500,000 consists of federal Temporary Assistance to Needy Families (TANF) funds earmarked for domestic abuse and sexual abuse civil legal services. These new grants will allow legal aid providers to reach a highly vulnerable population to provide much needed services.

We look forward to continued growth in 2016 and express our heartfelt appreciation to the many legal and banking community members who contribute their time, talents, resources and dedication to achieving equal access to justice for all.

Atty. Mary Lynne Donohue,

President

2015 Board of Directors

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Home

President's Message

Who We Are

Who Benefits?

WisTAF Grantees

Schedule of Grants

WisTAF Partners

Financial Information

Our Mission



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 \$46 million to organizations working toward the Foundation's vision of equal access to justice, regardless of income.

WisTAF administers and makes grants from 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 over \$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.

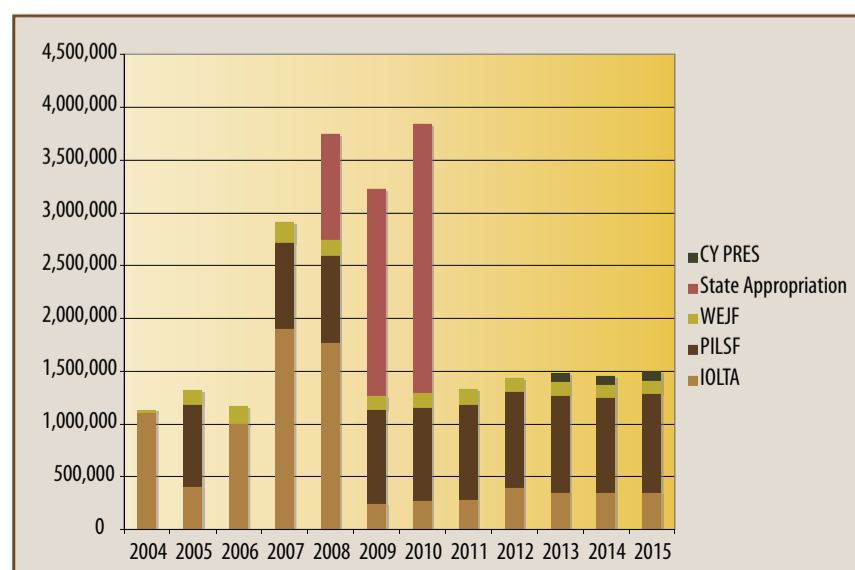
Cy Pres

Cy pres is a legal doctrine which commonly refers to residual funds left over from a class action lawsuit, but can also refer to funds from restitution, settlements, or penalties. Occasionally, courts designate WisTAF to receive such settlement agreement residual funds to use in making grants supporting civil legal services.

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. To date, over \$2 million has been raised via this important source and granted to civil legal service providers across Wisconsin.

WisTAF Grants by Year (2004-2015)



Home

President's Message

Who We Are

Who Benefits?

WisTAF Grantees

Schedule of Grants

WisTAF Partners

Financial Information

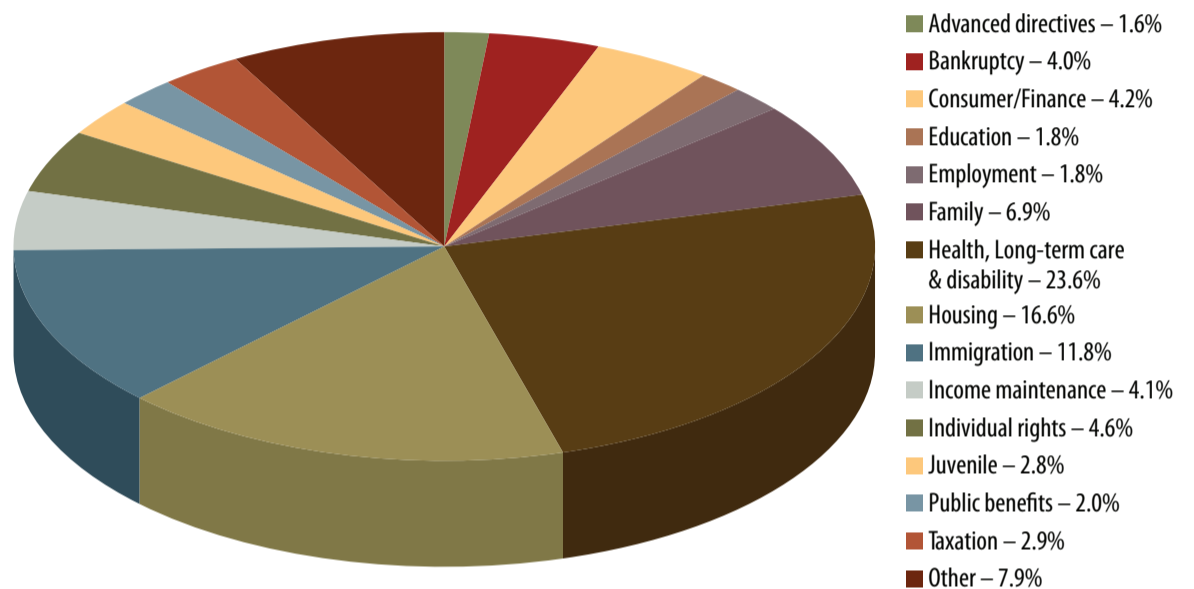
Our Mission

Legal Aid Changing Lives Who Benefits?

In 2015, legal aid organizations continued to make a significant difference in the lives of Wisconsin's most vulnerable residents. Families and individuals from the Northwoods, to the Lake Michigan and Mississippi River shorelines, to the State Line and countless communities in between received the legal expertise needed to help solve complex problems in areas such as domestic violence, home foreclosure, and health benefits eligibility to name just a few.

The following is a snapshot of the services provided by WisTAF grantees in 2015, along with real-life examples of people who were helped by legal aid.

Types of cases closed in 2015



Legal aid helps secure medical and financial health and wellness.

“Mike” and “Michelle” needed help coordinating insurance coverage for their son, “Will,” who has special health care needs. Managing Will’s care needs had always presented a challenge that occupied much of his parents’ time, but the situation became even more challenging when Mike suffered an injury that prevented him from continuing to work at his job. Mike’s need for surgery after losing his insurance left the family facing overwhelming medical bills. ABC for Health’s Health Benefits Counselors identified BadgerCare eligibility for the whole family that could backdate to cover Mike’s surgery and help Will continue to see his regular doctors. With reliable health coverage in place, Michelle decided to go see a doctor for the first time in years, where lab tests identified early cancer cells. Michelle’s doctor said the timing of the visit caught the cancer early enough to avoid devastating results. Michelle followed up with a thank you note to her ABC Health Benefits Counselor that started with the words, “I think you may have saved my life.”

– ABC for Health, Madison

Legal aid helps prevent homelessness and preserve independence.

“Ellen” was a victim of identity theft. Bedridden with MS, she required a caregiver to stay in her home. The caregiver opened six credit card accounts in Ellen’s name and made additional unauthorized charges on four existing cards. The identity theft also had left Ellen unable to pay her bills, including her mortgage, which left her in danger of foreclosure. Legal Action of Wisconsin staff attorneys worked with Ellen to identify the fraudulent charges, and then negotiated with the various creditors to remove over \$4,000 in erroneous debt. They also helped Ellen apply for loan modifications for both her primary and secondary mortgages lowering her monthly payment and saving her home, along with almost \$60,000 in equity. The caregiver was ultimately convicted of identity theft based on the information developed by Legal Action, and with the help of her Legal Action attorney, Ellen was connected with Aurora Family Services for ongoing money management services to make sure this did not happen again. As a result of Legal Action’s work, Ellen kept her house and received the services she needed to live independently.

– Legal Action of Wisconsin, Milwaukee



Home

President's Message

Who We Are

Who Benefits?

WisTAF Grantees

Schedule of Grants

WisTAF Partners

Financial Information

Our Mission



WisTAF Grantees

A Solid Foundation of Quality Legal Service Provision

In 2015, WisTAF distributed over \$1.5 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 2015 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.

Home

President's Message

Who We Are

Who Benefits?

WisTAF Grantees

Schedule of Grants

WisTAF Partners

Financial Information

Our Mission



Schedule of Grants

January 1 through December 31, 2015

	IOLTA	PILSF	Cy Pres	Pro Hac Vice	WEJF	Total
ABC for Health, Inc.	-0-	50,000	-0-	-0-	-0-	50,000
AIDS Network	-0-	12,000	-0-	-0-	-0-	12,000
AIDS Resource Center of Wisconsin	-0-	12,000	-0-	-0-	-0-	12,000
Catholic Charities of the Archdiocese of Milwaukee, Inc.	-0-	15,000	-0-	-0-	-0-	15,000
Catholic Charities of the Diocese of La Crosse, Inc.	-0-	15,000	-0-	-0-	-0-	15,000
Center Against Sexual & Domestic Abuse, Inc.	-0-	20,000	-0-	-0-	-0-	20,000
Centro Legal por Derechos Humanos	-0-	25,000	-0-	-0-	-0-	25,000
Community Justice, Inc.	-0-	11,000	-0-	-0-	-0-	11,000
Disability Rights Wiscon- sin	-0-	110,000	-0-	-0-	24,000	134,000
Kids Matter, Inc.	-0-	15,000	-0-	-0-	-0-	15,000
Legal Action of Wiscon- sin, Inc.	278,810	414,350	69,030	45,406	77,213	884,809
Legal Aid Society of Door County	-0-	10,000	-0-	-0-	-0-	10,000
Legal Aid Society of Mil- waukee	-0-	110,000	-0-	-0-	-0-	110,000
Portage County Legal Aid Society	-0-	14,000	-0-	-0-	-0-	14,000
Wisconsin Judicare, Inc.	71,190	105,800	17,626	11,594	18,787	224,997
Totals	350,000	939,150	86,656	57,000	120,000	1,552,806

Home

President's Message

Who We Are

Who Benefits?

WisTAF Grantees

Schedule of Grants

WisTAF Partners

Financial Information

Our Mission

2015 Prime Partners

- Citizens Bank
- Citizens Community Federal
- 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
- State Bank Financial

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, listed below, are IOLTA participating financial institutions that, during 2015, went 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 220 financial institutions maintained IOLTA accounts in 2015 – 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	2015*	2014
Total Current Assets	\$1,012,360	\$905,200
Fixed Assets	\$ 0	0
Investments	<u>873,692</u>	<u>923,699</u>
Total Assets	\$1,886,052	1,828,899
Liabilities and Net Assets		
Total Liabilities	\$ 0	\$ 0
Total Net Assets	<u>1,886,052</u>	<u>1,828,899</u>
Total Liabilities and Net Assets	\$1,886,052	\$1,828,899

Statement of Activities

Revenues	\$1,865,614	\$1,452,370
Expenditures		
Grants Awarded	\$1,617,096	\$1,512,928
Support Expenses	<u>191,365</u>	<u>192,345</u>
Total Expenditures	\$1,808,461	\$1,705,273
Increase (Decrease) in Net Assets	\$ 57,153	(\$252,903)
Net Assets – Beginning of Period	<u>1,828,899</u>	<u>2,081,802</u>
Net Assets – End of Period	\$1,886,052	\$1,828,899

**These are audited figures for the period ending December 31, 2015. Audit available upon request.*

Home

President's Message

Who We Are

Who Benefits?

WisTAF Grantees

Schedule of Grants

WisTAF Partners

Financial Information

Our Mission

2015 Prime Partners

- Citizens Bank
- Citizens Community Federal
- Farmers State Bank (Hillsboro)
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- First Business Bank (Milwaukee)
- First National Bank of Hartford
- Home Savings Bank
- Mound City Bank
- Peoples State Bank (Prairie du Chien)
- PNC Bank
- State Bank Financial

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[Home](#)

[President's Message](#)

[Who We Are](#)

[Who Benefits?](#)

[WisTAF Grantees](#)

[Schedule of Grants](#)

[WisTAF Partners](#)

[Financial Information](#)

[Our Mission](#)

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), and other sources.

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