

Legal professionals by trade.

Expert jugglers by necessity.



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Greetings friends and colleagues,

I am pleased to present the Wisconsin Trust Account Foundation's 2016 Annual Report.

A friend once explained to her five-year-old what I did for a living. "He's a lawyer. He helps people." Anyone who has spent time with a five-year-old understands why that didn't end the discussion. "But what does he do?" After attempting unsuccessfully to adequately explain what lawyers do, my friend finally gave up and said, "Well, he can juggle."

Since its inception in 1986, WisTAF has had to do a bit of juggling to collect and efficiently disburse money to agencies throughout Wisconsin who provide civil legal services to those in need. These agencies, in turn, have been proficient at juggling budgets and the increased need for their services. The agencies who receive funds provide legal services and advice in areas including domestic violence and custody issues, losing one's home or job, obtaining access to healthcare, and other legal areas where the access to legal service is life changing.

WisTAF continues to rely on the Interest On Lawyer's Trust Accounts (IOLTA) program and the Public Interest Legal Service Fund (PILSF) to fund civil legal services in every county in Wisconsin. Moreover, the State of Wisconsin has appropriated money for domestic abuse and sexual abuse civil legal services, and coordinated with WisTAF in order to implement that funding program and grant money to agencies.

WisTAF is currently implementing another program based on \$5.9 million received from a Bank of America settlement, to be used in coming years to fund legal services for mortgage foreclosure and community redevelopment issues. WisTAF has also been successful in working with other advocates to open new funding sources through pro hac vice admission fees for out-of-state lawyers, as well as directing state judges to funnel unused class-action settlement funds (cy pres) to WisTAF.

The agencies who receive funds through WisTAF (\$1.57 million total in 2016), along with their dedicated teams of lawyers and other professionals, deserve credit for doing what my friend explained to her five-year-old – they help people. Incredible staff and volunteers at WisTAF also deserve credit for another successful year, never ceasing their efforts to find new ways to fund services for those in need. We may never achieve the ultimate goal of equal access to justice for everyone with life changing legal needs, but WisTAF will continue to be a vital resource for helping lawyers and agencies juggle their un-ending demands and keeping the balls in the air.

Atty. Kevin J. Palmersheim,

President

2016 Board of Directors

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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, eviction, and obtaining the medical benefits they are due, to name just a few. When available, 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 over \$50 million to organizations working toward the Foundation's vision of equal access to justice, regardless of income.

Wisconsin Trust Account Foundation, Inc.

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. As of July 1, 2016, the Wisconsin Supreme Court implemented a rule directing that WisTAF will receive at least half of any such settlement agreement residual funds to use in making grants supporting civil legal services.

Pro Hac Vice

In 2014, the Wisconsin Supreme Court amended the "pro hac vice rule" – increasing the fee paid by nonresident lawyers to participate in a particular action (with an active member of the State Bar of Wisconsin). The Court directed that a portion of the fee increase be allocated to WisTAF to help support provision of civil legal services to low-income and indigent persons.

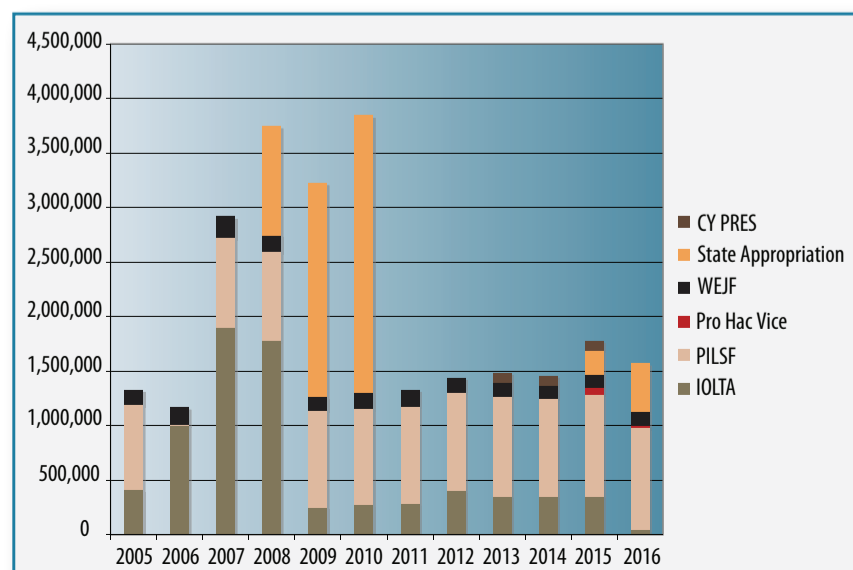
State Appropriation Funding

On occasion, the Wisconsin State Budget has included an appropriation of state funds made by a state agency to WisTAF to be granted out to providers of civil legal services to low-income Wisconsinites.

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 \$2.2 million has been raised via this important source and granted to civil legal service providers across Wisconsin.

WisTAF Grants by Year (2005-2016)



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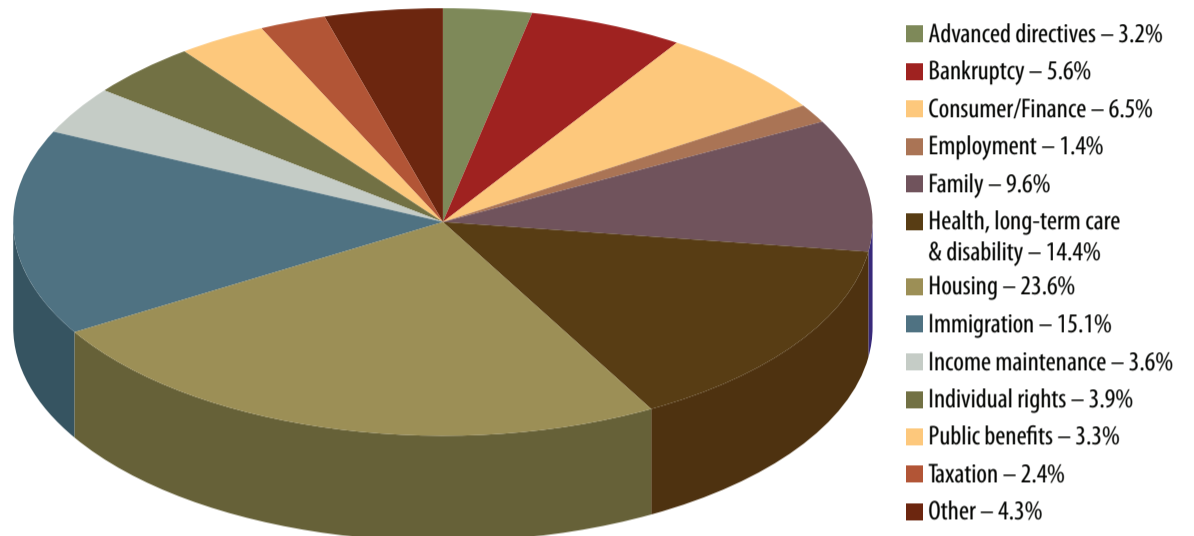
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Legal Aid Changing Lives Who Benefits?

In 2016, 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 2016, along with real-life examples of people who were helped by legal aid.

Types of cases closed in 2016



Legal aid helps secure shelter and independence.

“Mary” is an elderly victim of identity and financial theft. Bedridden with MS, Mary needed a caregiver to stay in her home. The caregiver opened six credit card accounts in Mary’s name and made additional unauthorized charges on four existing cards. Mary’s Legal Action of Wisconsin attorney worked with her to identify over \$4,000 in fraudulent charges, and then negotiated with the various creditors to remove the charges. The caregiver was ultimately convicted of identity theft based on the information developed by Legal Action attorneys. Mary’s attorney also helped her make a connection with Aurora Family Services for ongoing money management to make sure she was not victimized again.

Without Legal Action’s assistance, Mary would have been unable to pay her bills and would have faced foreclosure – ending any hope of living out her last days in her home. Fortunately, Mary’s attorney helped her apply for mortgage loan modifications, which saved her home.

– *Legal Action of Wisconsin*

Legal aid helps parents provide for their children’s needs.

“Julia” came to Centro Legal in a moment of desperation. Her son, “Daniel,” has cerebral palsy, is limited to using a wheelchair and requires round-the-clock care, attention and support. Julia handles all of Daniel’s care on her own because Daniel’s father is absent from the picture. He was never interested in participating in his son’s life, and even less interested in learning how to care for him. With the overwhelming cost of Daniel’s care, Julia struggled to make ends meet. Years ago, a court ordered Daniel’s father to pay child support, but he rarely ever did. In addition, Julia speaks only Spanish and has limited literacy, so seeking legal resources was extraordinarily challenging for her. Intimidated by the court process and scared to confront Daniel’s father, Julia asked Centro Legal for help. On her behalf, Centro Legal filed a motion in Family Court to modify child support and hold Daniel’s father accountable for his child support debt. In doing so, Julia’s attorney accompanied her to court and obtained an order for repayment of the child support arrears. In addition, Centro Legal obtained updated employment information so that these orders can be enforced in the future, when necessary. As a result, Julia’s weekly child support payments were increased by 33%, helping alleviate her financial distress. Julia walked out of court with more confidence and comfort that she could continue to care for Daniel into the future.

– *Centro Legal por Derechos Humanos*



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WisTAF Grantees

A Solid Foundation of Quality Legal Service Provision

In 2016, WisTAF made over \$1.4 million in grant awards to 22 agencies. 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 2016 grant recipients continue to share their dedication, skill, and innovation in providing help 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 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 in the Milwaukee area.

***Community Justice, Inc.** is a nonprofit corporation that provides legal services to low-income families and individuals in Dane and surrounding counties 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.

***End Domestic Abuse Wisconsin** – RISE Law Center provides quality, affordable direct legal representation to low income survivors of Domestic Violence & Sexual Abuse, primarily immigrants and refugees with limited English proficiency, in an effort to prevent and eliminate violence in intimate partner relationships.

***Family Services of Southern Wisconsin and Northern Illinois Family Services** is a multi-program social service agency that provides a constellation of programs designed to assist individuals through best practice social work practices.

***Golden House** is a private, nonprofit agency that provides safety and support for victims of domestic abuse, while leading community efforts to end domestic violence in Brown County.

***HAVEN, INC. (Household Abuse Victims Emergency Network, Inc.)** is a free community service providing a safe and confidential environment to empower all survivors of domestic violence and sexual assault through sheltering, advocacy and education.

***Indianhead Community Action Agency** is a private, nonprofit agency that assists individuals in achieving self-sufficiency by providing the resources, education and services necessary to develop healthy families, sustainable communities and strong local businesses.

***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.

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***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.

***Rainbow House Domestic Abuse Services** provides prevention, education and information to communities, families and schools with the goal of obtaining safety and empowerment for all victims of domestic abuse.

***Sojourner Family Peace Center's** mission is to transform lives impacted by domestic violence by providing non-judgmental, victim-centered and respectful listening and information to victims about their options, guiding them as they weigh the risks and benefits of each.

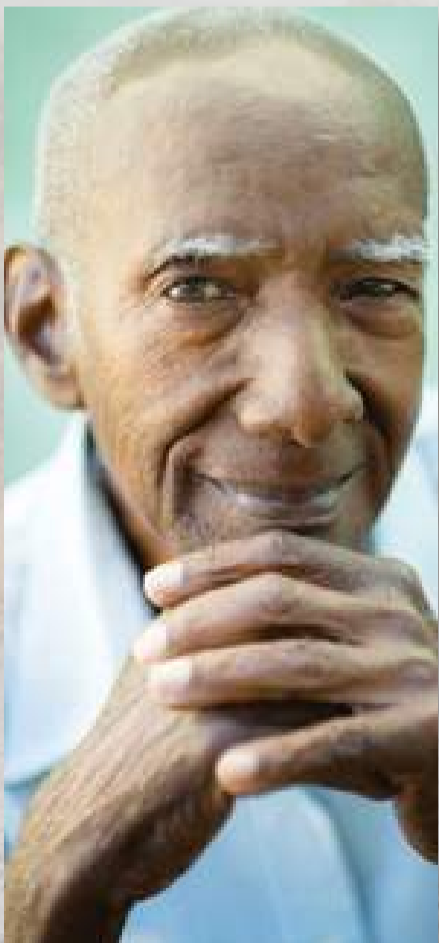
***Wisconsin Judicare, Inc.** provides civil legal assistance, information and education to low-income people, Native Americans, and others who might otherwise be denied access to justice.

***Women's and Children's Horizons** provides services to survivors of domestic abuse and sexual assault that enhances their safety, well-being, and self-sufficiency.

**Agencies with an asterisk preceding their names received Domestic Violence & Sexual Abuse Civil Legal Services State Appropriation funding in 2016.*

Schedule of Grants January 1 through December 31, 2016

| | IOLTA | PILSF | Pro Hac Vice | State Appropriation | WEJF | Total |
|---|---------------|----------------|-----------------|------------------------|----------------|------------------|
| ABC for Health, Inc. | -0- | 34,100 | -0- | -0- | -0- | 34,100 |
| AIDS Resource Center of WI | -0- | 16,400 | -0- | -0- | -0- | 16,400 |
| Catholic Charities of the Archdiocese of Milwaukee, Inc. | -0- | 10,200 | -0- | -0- | -0- | 10,200 |
| Catholic Charities of the Diocese of La Crosse, Inc. | -0- | 10,200 | -0- | -0- | -0- | 10,200 |
| Center Against Sexual & Domestic Abuse, Inc. | -0- | 13,700 | -0- | 35,100 | -0- | 48,800 |
| Centro Legal por Derechos Humanos | -0- | 20,000 | -0- | 50,000 | -0- | 70,000 |
| Community Justice, Inc. | -0- | 9,000 | -0- | 40,000 | -0- | 49,000 |
| Disability Rights Wisconsin | -0- | 74,000 | -0- | 7,500 | 24,000 | 105,500 |
| End Domestic Abuse WI (RISE) | -0- | -0- | -0- | 29,250 | -0- | 29,250 |
| Family Services of S. WI & N. IL | -0- | -0- | -0- | 18,750 | -0- | 18,750 |
| Golden House | -0- | -0- | -0- | 37,500 | -0- | 37,500 |
| Haven, Inc. | -0- | -0- | -0- | 40,000 | -0- | 40,000 |
| Indianhead Community Action Agency | -0- | -0- | -0- | 50,000 | -0- | 50,000 |
| Kids Matter, Inc. | -0- | 13,000 | -0- | 7,500 | -0- | 20,500 |
| Legal Action of Wisconsin, Inc. | 34,000 | 509,750 | 18,300 | 37,500 | 77,213 | 676,763 |
| Legal Aid Society of Door County | -0- | 9,000 | -0- | -0- | -0- | 9,000 |
| Legal Aid Society of Milwaukee | -0- | 74,000 | -0- | 20,650 | -0- | 94,650 |
| Portage County Legal Aid Society | -0- | 12,000 | -0- | -0- | -0- | 12,000 |
| Rainbow House Domestic Abuse Services, Inc. | -0- | -0- | -0- | 13,750 | -0- | 13,750 |
| Sojourner Family Peace Center | -0- | -0- | -0- | 15,000 | -0- | 15,000 |
| Wisconsin Judicare, Inc. | 11,000 | 127,900 | 4,470 | 37,500 | 18,787 | 199,657 |
| Women's & Children's Horizons | -0- | -0- | -0- | 10,000 | -0- | 10,000 |
| Totals | 45,000 | 933,250 | 22,770 | 450,000 | 120,000 | 1,571,020 |



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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, listed to the right, are IOLTA participating financial institutions that, during 2016, 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

More than 200 financial institutions maintained IOLTA accounts in 2016 – 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.

2016 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)
- State Bank Financial

Summarized Financial Information

Statement of Financial Position

| Assets | 2016* | 2015 |
|--|--------------------|--------------------|
| Total Current Assets | \$1,043,322 | \$1,012,360 |
| Fixed Assets | .0 | 0 |
| Investments | <u>\$6,666,066</u> | <u>\$873,692</u> |
| Total Assets. | \$7,709,388 | \$1,886,052 |
| Liabilities and Net Assets | | |
| Total Liabilities. | \$1,075,696 | \$0 |
| Total Net Assets. | <u>\$6,633,692</u> | <u>\$1,886,052</u> |
| Total Liabilities and Net Assets | \$7,709,388 | \$1,886,052 |

Statement of Activities

| | | |
|---|--------------------|------------------|
| Revenues | \$7,550,144 | \$1,865,614 |
| Expenditures | | |
| Grants Awarded | \$1,725,552 | \$1,617,096 |
| Support Expenses | <u>\$150,189</u> | <u>\$191,365</u> |
| Total Expenditures | \$1,875,741 | \$1,808,461 |
| Increase (Decrease) in Net Assets | \$4,747,640 | \$57,153 |
| Net Assets – Beginning of Period | <u>\$1,886,052</u> | <u>1,828,899</u> |
| Net Assets – End of Period | \$6,633,692 | \$1,886,052 |

*These are audited figures for the period ending December 31, 2016. Audit available upon request.

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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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