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seeds of *Hope*



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Greetings friends and colleagues,

It is my pleasure to share with you the Wisconsin Trust Account Foundation's 2012 Annual Report.

As I contemplate WisTAF's efforts to help make access to justice a reality for thousands of Wisconsin's disadvantaged residents, I am reminded of a quote by entrepreneur and author Bo Bennett: "As sure as the spring will follow the winter, prosperity and economic growth will follow recession." The quote strikes me as especially relevant this year given that Wisconsin's spring and the nation's economic recovery have much in common – namely, they both have been keeping us waiting.

At the close of 2012, WisTAF's IOLTA net interest yield hovered around 0.1 percent. Rates aren't expected to rebound in the near future as the Federal Reserve has indicated that they plan to hold the federal funds rate at its present level (0 to 0.25 percent) through at least mid-2015 so that potential growth in the economy doesn't falter.

2012 IOLTA income, however, remained fairly level despite the declining rates due to the rise in principal balances held in IOLTA accounts over the course of the year. The increase – although moderate – has been enough to offset the loss of earnings due to lower interest rates.

Fortunately, inadequate IOLTA income was supplemented by a few unexpected and welcome revenue sources in 2012. First, the Foundation was the recipient of a *cy pres* award of \$258,000 stemming from a national class action case settlement that was decided in the Washington court system. IOLTA programs across the country received a portion of the settlement relative to the proportion of affected class members in their state. The Foundation also was honored to be selected as the 2012 recipient of the State Bar of Wisconsin's "Go Casual for Justice" fundraiser – which generated nearly \$2,400 in private donations.

While not nearly enough to address the gaping hole in access to justice, every penny from IOLTA income to Public Interest Legal Services Fund (PILSF) contributions, to *cy pres* awards and private donations has proven extremely valuable to WisTAF-funded service providers.

As Wisconsin's largest private funding source for civil legal aid programs, WisTAF exists to ensure that low-income people have access to information, advice and representation in regards to non-criminal legal issues. WisTAF awarded grants to 15 civil legal aid programs spanning the state in 2012. Grant disbursements totaled approximately \$1.3 million and were used to aid children, women and men in all 72 Wisconsin counties. WisTAF is proud to aid the efforts of these amazing programs.

Here in Wisconsin, spring has finally graced us with its presence, bringing with it renewed hope that the nation's economic struggles – and their impact on the most vulnerable of our residents – soon will dissipate leaving room for new growth and solid ground.

With sincere thanks to WisTAF's Board of Directors, grantees, and legal & banking profession partners,

Joel Bailey, President

2012 Board of Directors

President

Mr. Joel Bailey – Janesville

Vice President

Atty. Mary Lynne Donohue – Sheboygan

Secretary

Atty. Kristin Bergstrom – Milwaukee

Treasurer

Mr. Robert Zellers – Madison

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Atty. Grant Birtch – Neenah

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Atty. Kevin Palmersheim – Middleton

Hon. Gary Sherman – Madison

Ms. Denes Tobie – Madison

Atty. Nicholas Zales – Milwaukee

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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 \$42 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.

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 geographically throughout the ten state judicial districts in proportion to the poverty populations in each district. 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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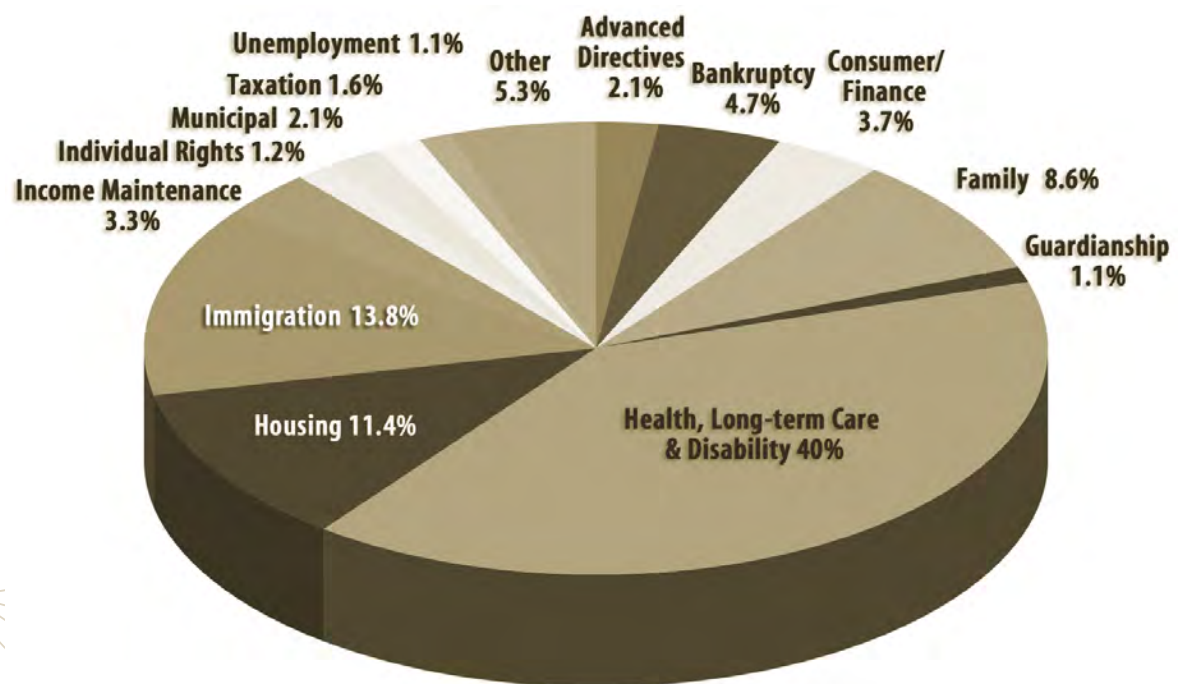
Legal Aid Changing Lives

Who Benefits?

In 2012, legal aid organizations made a significant difference in the lives of low-income residents of Wisconsin who had nowhere to turn for help with their civil legal matters. 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 2012, along with real-life examples of people who were helped by legal aid.

Types of cases closed by WisTAF grant recipients in 2012



Legal aid helps victims of domestic abuse.

Jennifer is a woman with a disabled child and an abusive husband. Physically abused, forbidden to work, and denied access to marital funds, car keys and a phone – Jennifer was systematically isolated by her spouse. She came to Community Justice, Inc. (CJI) with the very little money she was able to scrape together with hopes of a better life for her child. CJI filed her divorce and obtained an order for support within weeks of Jennifer's escape from the home, allowing her to obtain housing, employment and care for her child. Without CJI's assistance Jennifer and her child would likely have been forced to return to the unsafe home.

Community Justice, Inc. – *Madison*

Legal aid helps secure independence.

16-year-old foster youth Justin received a wage attachment notice stating that 20% of his income from his part-time job at Burger King would be garnished until an outstanding loan for a car purchase in 2008 was paid off. In 2008, Justin was only 12-year-old. Justin's identity was stolen. The ensuing bad debt impacted Justin's credit rating and would hinder his ability to qualify for college student loans. The attorneys at Kids Matter were able to reverse the garnishment and clear Justin's credit rating – giving Justin a fair start that includes a higher education and the ability to manage his financial future.

Kids Matter, Inc. - *Milwaukee*



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Providing Hope Through Quality Legal Services

In 2012, WisTAF distributed over \$1.4 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 2012 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.

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

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, 2012

	IOLTA Grants	PILSF Grants	WEJF Grants	Total
ABC for Health, Inc.	-0-	50,000	-0-	50,000
AIDS Network	-0-	12,000	-0-	12,000
AIDS Resource Center of Wisconsin	-0-	12,000	-0-	12,000
Catholic Charities of the Archdiocese of Milwaukee, Inc.	-0-	10,000	-0-	10,000
Catholic Charities of the Diocese of La Crosse, Inc.	-0-	10,000	-0-	10,000
Center Against Sexual & Domestic Abuse, Inc.	-0-	15,000	-0-	15,000
Centro Legal por Derechos Humanos	-0-	20,000	-0-	20,000
Community Justice, Inc.	-0-	15,000	-0-	15,000
Disability Rights Wisconsin	-0-	100,000	25,800	125,800
Kids Matter, Inc.	-0-	10,000	-0-	10,000
Legal Action of Wisconsin, Inc.	313,520	419,760	80,888	814,168
Legal Aid Society of Door County	-0-	4,900	-0-	4,900
Legal Aid Society of Milwaukee	-0-	100,000	-0-	100,000
Portage County Legal Aid Society	-0-	10,000	-0-	10,000
Wisconsin Judicare, Inc.	86,480	115,790	22,312	224,582
Totals	400,000	904,450	129,000	1,433,450



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2012 Prime Partners

- Alliance Bank – New Ulm
- BMO Harris Bank
- Calumet County Bank
- Citizens Bank of Mukwonago
- Commerce State Bank
- First Bank Financial Centre
- Farmers State Bank Hillsboro
- First Business Bank Madison
- First Business Bank Milwaukee
- First National Bank of Hartford
- Gateway Community Bank
- Home Savings Bank
- Integrity First Bank
- Mound City Bank
- Peoples State Bank Prairie du Chien
- PNC Bank
- River Valley 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 to the right, are IOLTA participating financial institutions that, during 2012, 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 2012 – 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

	2012*	2011
Assets		
Total Current Assets	\$ 916,638	\$ 847,167
Fixed Assets	\$ 1,542	\$ 2,315
Investments	\$1,275,398	\$1,165,523
Total Assets	\$2,193,578	\$2,015,005
Liabilities and Net Assets		
Total Liabilities.	\$ 0	\$ 0
Total Net Assets	\$2,193,578	\$2,015,005
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Statement of Activities

Revenues	\$1,850,329	\$1,447,234
Expenditures		
Grants Awarded	\$1,488,273	\$1,379,026
Support Expenses	\$ 183,483	\$ 190,426
Total Expenditures	\$1,671,756	\$1,569,452
Increase (Decrease) in Net Assets	\$ 178,573	(\$ 122,218)
Net Assets – Beginning of Period	\$2,015,005	\$2,137,223
Net Assets – End of Period	\$2,193,578	\$2,015,005

*These are audited figures for the period ending December 31, 2012. Audit available upon request.

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- Citizens Bank of Mukwonago
- Commerce State Bank
- First Bank Financial Centre
- Farmers State Bank Hillsboro
- First Business Bank Madison
- First Business Bank Milwaukee
- First National Bank of Hartford
- Gateway Community Bank
- Home Savings Bank
- Integrity First 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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WISTAF
Funding Civil Justice