



**TURNING
OBSTACLES
INTO
OPPORTUNITIES**

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Wisconsin Trust Account Foundation, Inc. 2011 ANNUAL REPORT



WisTAF President Dean Dietrich addresses attendees of the organization's 25th Anniversary Celebration

Photo courtesy of the State Bar of Wisconsin

PRESIDENT'S MESSAGE

Greetings friends and colleagues,

It is my pleasure to share with you the Wisconsin Trust Account Foundation's annual report for 2011 – yet another year filled with obstacles and opportunities leading to great accomplishments.

To commemorate its 25th anniversary, WisTAF hosted a reception showcasing legal aid work and those who make it happen at the 2011 Wisconsin Equal Justice Conference in Milwaukee. The Foundation also strengthened relationships with members of the legal community and its IOLTA-participating banking partners in an effort to raise awareness of the state's growing need for civil legal assistance – a need compounded by a reduction in available funding for legal aid providers.

This past year witnessed the elimination of civil legal services funding from the State of Wisconsin 2011-2013 budget. The funding eradication comes at a time when Wisconsin's residents are suffering most from the weak economy. This reduction in Legislative funding combined with a drop in IOLTA income, due to continued low interest rates, resulted in a revenue loss of more than \$2.6 million over 2010; effectively cutting the Foundation's available grant funding by two-thirds. However, Wisconsin legal aid programs rose to the challenge, directly assisting nearly 10,000 individuals from every county of the state with their civil legal needs. And, we are hopeful that this vital funding source will again be prioritized as the effects of its absence are seen by those elected to represent all of the state's residents.

As I wrap up my six-year tenure on the WisTAF Board of Directors, I'd like to express my sincere gratitude to the Foundation's board and staff for their passionate commitment to access to justice. I must also recognize the leadership and support we receive on a continual basis from the Wisconsin Supreme Court, the State Bar of Wisconsin, the Wisconsin Access to Justice Commission, and other organizations and individuals too numerous to mention here.

Finally, I would like to dedicate this annual report to the legal aid providers who, despite the obstacles presented, continue to go above and beyond in their provision of quality legal services – giving hope and opportunity to thousands of Wisconsin residents each year.

Dean Dietrich, President

2011 Board of Directors

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Wausau

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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 \$40 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 civil 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.

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LEGAL AID CHANGING LIVES

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In 2011, 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. As the poverty population increases, state and federal cuts to legal aid and the continued decline of IOLTA revenue will directly affect thousands of families who desperately seek representation in cases involving domestic violence, home foreclosures, and veterans benefits, among others.

Following is a snapshot of the services provided by WisTAF grantees in 2011, along with real-life examples of people who were helped by legal aid.

Legal aid helps victims of domestic abuse.

Megan, a woman with three small children, became fearful of her husband, who had threatened to kill her twice during the year. She was forced to flee from her home and move to a shelter when the husband became violent towards the children. A Wisconsin Judicare panel attorney was able to obtain a 4-year injunction, with a firearms restriction against the husband, and an order allowing Megan to have the use of the home. PILSF funds are now allowing Megan to seek a divorce, which would have been too costly otherwise.

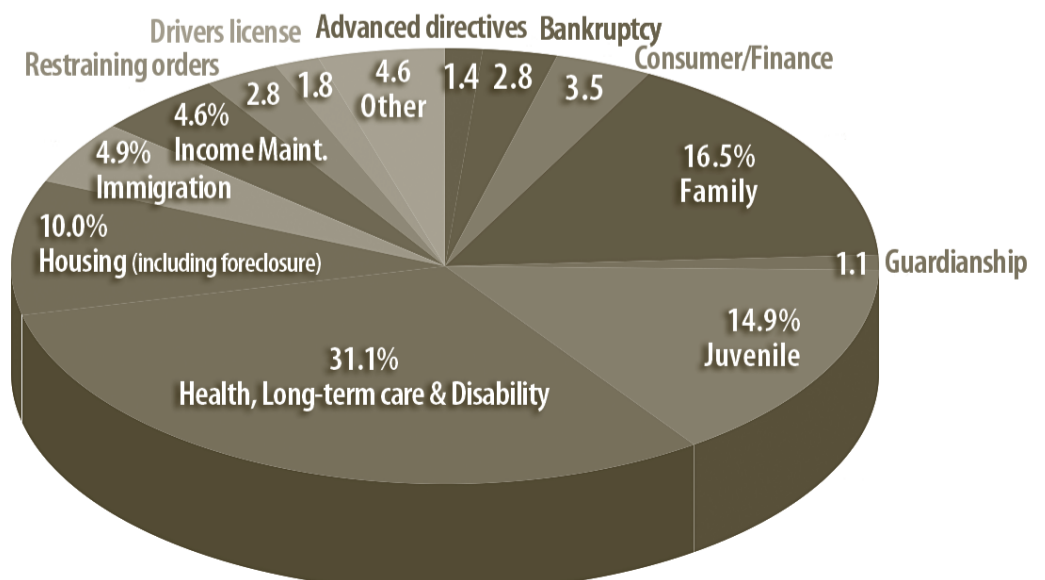
Wisconsin Judicare, Inc. – Wausau

Legal aid helps secure independence.

ABC for Health met Greg in the hospital shortly after a simple infection in his leg started to take over his whole body. At one point in his past, Greg had held a rather impressive job and was far from considering himself “low income.” It only took one car accident to change Greg’s life. For the past ten years, Greg suffered from a host of medical and mental ailments, resulting in unemployment, loss of medical insurance and homelessness. Other agencies had attempted to help Greg in the past, but his health and transitory living arrangements presented too many barriers. Greg felt completely alone in his fight and attempted three times to take his own life. And then he was connected with ABC for Health. ABC started by enrolling Greg in SafeLink, which provides a free cell phone to low-income individuals. This simple act proved priceless as ABC attorneys and advocates stayed in close contact with Greg and pieced together all his relevant medical, employment, and financial information. Eventually, Greg prevailed. Without the assistance of skilled attorneys and advocates, any other individual in Greg’s situation may have given up. Greg was approved for disability benefits to get him the treatment and medication he needs. He is now employed, living in his own apartment and is enjoying, as Greg puts it, “his new chance at life.”

ABC for Health – Madison

Types of cases closed in 2011



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PROVIDING HOPE THROUGH QUALITY LEGAL SERVICES

In 2011, WisTAF granted over \$1.3 million to 16 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 2011 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. *(Click on name of Grantee for a link to their web site.)*

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 low-income families and individuals in Southcentral and Southeastern Wisconsin 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.

People Against Domestic and Sexual Abuse (PADA) serves victims of domestic and sexual abuse in Jefferson County. Legal advocacy is one of the many services provided.

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. is a nonprofit law firm dedicated to providing equal access to justice for residents of Wisconsin's northern thirty-three counties and eleven federally-recognized Indian tribes.



SCHEDULE OF GRANTS

JANUARY 1 THROUGH DECEMBER 31, 2011

	IOLTA Grants	PILSF Grants	WEJF Grants	Total
ABC for Health, Inc.	-0-	32,600	-0-	32,600
AIDS Network	-0-	8,500	-0-	8,500
AIDS Resource Center of Wisconsin	-0-	12,000	-0-	12,000
Catholic Charities of the Archdiocese of Milwaukee, Inc.	-0-	15,000	-0-	15,000
Catholic Charities of the Diocese of La Crosse, Inc.	33,000	-0-	-0-	33,000
Center Against Sexual & Domestic Abuse, Inc.	-0-	18,000	-0-	18,000
Centro Legal por Derechos Humanos	-0-	33,700	-0-	33,700
Community Justice, Inc.	-0-	10,500	-0-	10,500
Disability Rights Wisconsin	35,300	51,900	30,120	117,320
Kids Matter, Inc.	10,000	-0-	-0-	10,000
Legal Action of Wisconsin, Inc.	131,660	493,910	94,432	720,002
Legal Aid Society of Door County	-0-	4,900	-0-	4,900
Legal Aid Society of Milwaukee	36,700	54,100	-0-	90,800
People Against Domestic & Sexual Abuse	-0-	7,200	-0-	7,200
Portage County Legal Aid Society	-0-	12,600	-0-	12,600
Wisconsin Judicare, Inc.	36,340	138,365	26,048	200,753
Totals	283,000	893,275	150,600	1,326,875

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Alliance Bank – New Ulm
BMO Harris Bank
Calumet County Bank
Citizens Bank of Mukwonago
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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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 at right, are IOLTA participating financial institutions that, during 2011, 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

More than 230 financial institutions maintained IOLTA accounts in 2011 – 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

	2011*	2010
Total Current Assets	\$847,249	\$792,372
Fixed Assets	27	653
Investments	\$1,165,523	\$1,494,198
Total Assets	\$2,012,799	\$2,287,223
Total Liabilities	\$0	\$150,000
Total Net Assets	\$2,012,799	\$2,137,223
Total Liabilities and Net Assets	\$2,012,799	\$2,287,223

Statement of Activities

Revenues	\$1,447,234	\$4,249,091
Expenditures		
Grants Awarded	\$1,326,875	\$3,892,849
Support Expenses	\$244,892	\$216,401
Total Expenditures	\$1,571,767	\$4,109,250
Increase (Decrease) in Net Assets	(\$124,424)	\$139,841
Net Assets – Beginning of Period	\$2,137,223	\$1,997,382
Net Assets – End of Period	\$2,012,799	\$2,137,223

*These are unaudited figures for the period ending December 31, 2011. Audit available upon request.

2011 PRIME PARTNERS

Alliance Bank – New Ulm
BMO Harris Bank
Calumet County Bank
Citizens Bank of Mukwonago
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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