



investing in justice for all

A silhouette of three hikers on a mountain peak against a sunset sky. One hiker is at the top, another is in the middle, and a third is at the bottom, reaching up to help the middle hiker. The sky is a mix of blue and orange, with clouds visible.

Adapting and Advancing

2024 Annual Report

Wisconsin Trust Account Foundation, Inc.

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Treasurer**

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* Beginning July 1, 2024

** Through June 30, 2024

Staff

Executive Director
Rebecca L. Murray

Assistant Executive Director
Tehmina Islam

Grants Program Manager
Jeff Brown

Communications and Development Manager
Benson Gardner

Chairperson's Message

In 1986, the Wisconsin Supreme Court established the Wisconsin Trust Account Foundation (WisTAF). WisTAF plays an important role in Wisconsin's legal aid landscape: it's one part civil legal aid funding administrator; one part access to justice advocate; and another part cheerleader and strategic partner to Wisconsin's civil legal aid organizations.

WisTAF's Board is made up of attorneys, judges, and members of the public – each of whom seeks to make a difference. WisTAF's small but mighty staff never ceases to amaze whether searching for new or additional funding, working hand in hand with grant recipients, facilitating financial institution compliance with IOLTA program policies and procedures, telling the stories of individuals benefiting from legal aid, collaborating with colleagues at the national level, or providing first rate support and guidance to the Board.

During my time on the WisTAF Board, I have learned much about civil legal aid and access to justice in Wisconsin. Here are some highlights:

- WisTAF grant recipients provide representation to low-income individuals in matters involving basic human needs such as housing, healthcare, employment, family law, restraining orders, termination of parental rights, immigration, and the like;
- the need for free and reduced fee civil legal services greatly outweighs the supply of those services;
- for every dollar invested in civil legal aid in Wisconsin the economy receives a return of \$8.40;
- Wisconsin legal aid providers represent individuals in all of Wisconsin's 72 counties and members of the 11 federally recognized tribal nations located within Wisconsin's borders;
- Wisconsin's legal aid community is strong, innovative, and unwavering in its commitment to achieving positive outcomes for clients and a more just society;
- when parties are represented in court, everyone benefits, i.e., the case proceeds more smoothly, courts operate more efficiently, and the outcomes are more equitable.

Since its establishment, WisTAF has disbursed nearly \$87,000,000 to Wisconsin civil legal aid providers who in turn used those funds to represent individuals in civil matters who could not otherwise afford an attorney.

I'm delighted to report that this spring the Wisconsin Supreme Court granted a petition to increase the Public Interest Legal Services Fund (PILSF) assessment from \$50 to \$75 as of July 1, 2025 and to \$100 as of July 1, 2027. This means that WisTAF will have more money to disburse to Wisconsin's legal aid providers and, in turn, they will be able to help more Wisconsinites in need of legal representation. The outlook for access to justice in Wisconsin is bright.

In closing, this year offers an important reminder that the rule of law, due process, and upholding the constitution matters in a civil society. Being kind, respectful, and honest is more important than ever. We should strive to help others, see value and promise in every person, lead by example, stay true to our convictions, and never give up!

Joshua J. Kindkeppel, *Chairperson*



Executive Director's Message

Each March, the Madness overwhelms my household as we join millions of basketball fans in rooting for our teams and predicting the results of the NCAA men's and women's basketball tournaments. And each March, I cling to the hope that my teams will, as legendary NC State Coach Jim Valvano so aptly said, "survive and advance."

The now famous motto speaks to persistence and strategic focus in overcoming obstacles. Civil legal aid is full of survivors – from the crime victims, veterans, and low-wage working families who receive critical legal help to the once-fledgling legal aid providers who, despite perpetually scarce resources, have expanded services to thousands of clients throughout the state each year.

Beyond surviving, I'd suggest the civil legal aid community has become increasingly skilled in *adapting* to challenge and change. In 2024, WisTAF continued its dual leadership and support roles in *advancing* solutions to challenges both immediate and long-term.

- Partnered with financial institutions to boost IOLTA funding for direct legal services and advance their community support goals.
- Supported Supreme Court Rule Petition 24-05 to increase the Public Interest Legal Services Fund (PILSF), established to bolster civil legal aid.
- Collaborated with statewide partners to advocate for public investment in civil legal aid via the 2025-2027 state budget.
- Leveraged a diversified mix of funding sources to make grants exceeding historical totals in areas of the largest unmet need, including a second round of Legal Aid Advancement grants.
- Raised awareness of WisTAF's mission and work through education about the role of *cy pres* awards in narrowing the justice gap and #OppositeOfPoverty social media campaign message development.
- Undertook a robust data collection, analysis, and reporting improvement project so we can better share metrics and real-life outcomes of civil legal aid.
- Moved our operational accounts to a Prime Partner bank (Bank Five Nine) because every cent matters. (See Prime Partner Program, p.6.)

Despite our advances, challenges persist. The need to adapt continues. Civil legal aid providers face funding shortages resulting in widening service gaps. In our largest grant program, more eligible clients had to be turned away than could be helped in 2024, due solely to lack of resources. Programs funded by COVID-era grant sources will expire in 2025. Dozens of legal aid providers are feeling the pain of sharp decreases in federal funding, such as Victims of Crime Act (VOCA) grants.

Nonetheless, the creative resilience of our partner organizations inspires hope. Legal aid organizations are increasingly exploring technology and alternative service models to expand their reach and improve the efficiency and effectiveness of their services.

Civil legal aid is a far cry from a single-elimination tournament where teams don't have the ability to adapt in order to survive. My hope for 2025 and beyond is that "adapt and advance" becomes a rallying cry for a community where setbacks may be common, but grit is limitless.

Rebecca L. Murray, *Executive Director*

Civil cases involving crime victims sometimes intertwine with criminal cases. "Jane" tried to report her sexual assault, but her trauma and mental health issues combined with a lack of necessary law enforcement commitment led to **10 years without justice**. LOTUS Legal Clinic changed that. Her attorney built trust, collaborated with Jane's care team, and designed processes that accommodated her special communication needs. This enabled Jane to provide a written statement of her experience. The attorney then secured a proper investigation by highly experienced detectives. When the District Attorney issued sexual assault charges against her assailant, Jane closed an important chapter in her long journey toward justice.



2024 Impact

Justice should be for everyone, regardless of income.

In 2024, the Wisconsin Trust Account Foundation (WisTAF) administered grants that allowed more than 13,000 people, spread across every county in Wisconsin, to access justice in matters of civil law. Total resources of \$9 million went toward assisting these clients as well as building provider capacity for the coming years.

Mission

The Wisconsin Trust Account Foundation works with civil legal aid organizations in Wisconsin to increase access to justice. We oversee funds and invest in services and projects to help people resolve their legal problems.

Why We Exist

Someone accused of a crime has the right to an attorney. The same is not true for victims of a crime, nor almost anyone involved in a *civil* legal situation.

And since our legal system is complicated, without a lawyer most people can't protect their rights and liberties when they are violated. So what happens if you can't afford an attorney?

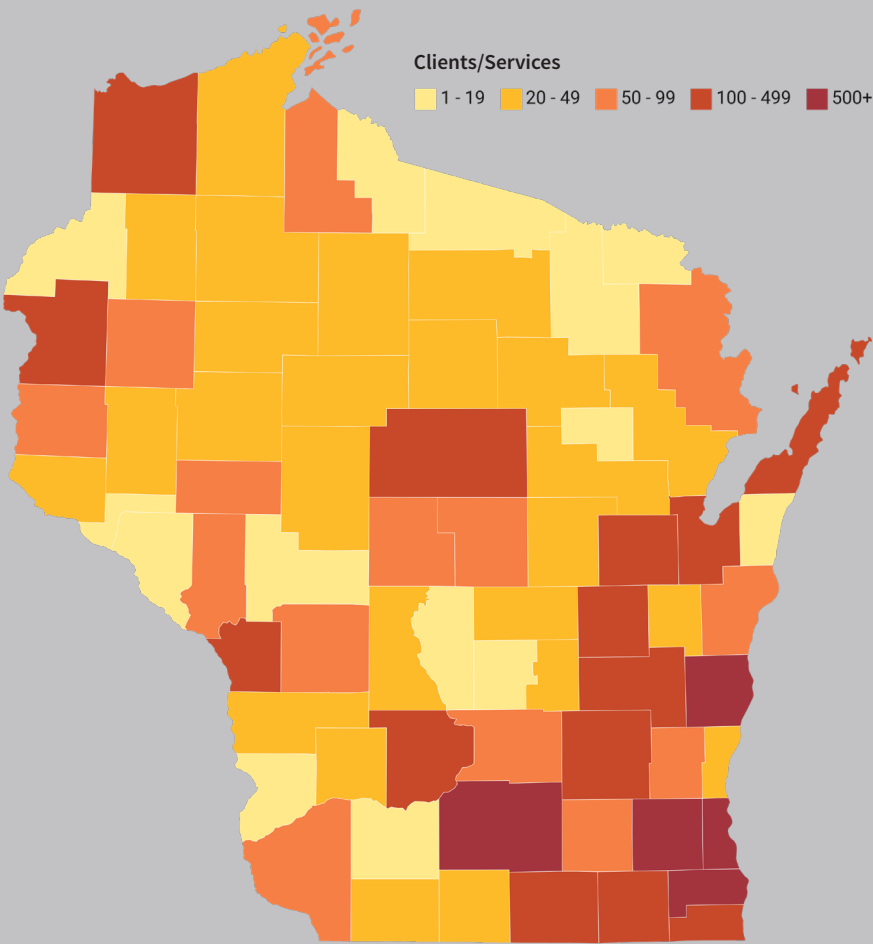
This is where our grants come in. We fund civil legal aid: professional legal assistance for people who can't afford attorneys. All over Wisconsin, people found the ability to secure their family's safety through restraining orders, avoid wrongfully losing their homes or jobs, protect their health or veterans' benefits, and address a myriad of other serious concerns.

The Wisconsin Trust Account Foundation, Inc. (WisTAF) is a 501(c)(3) nonprofit corporation and the civil legal aid funding administrator established by the Wisconsin Supreme Court to aid the courts in carrying on and improving the administration of justice.

Where Civil Legal Aid Clients Live (All Programs)

The following map illustrates the approximate, overall reach of WisTAF grants based on reported number of services provided and clients served.

Created with Datawrapper



2024 Grant Programs

Direct Legal Services

WisTAF's longest-standing grant program helps low-income people solve major problems in their lives. Cases may focus on anything in the area of civil law. Thus, these grants helped people in nearly every county in Wisconsin to seek justice, and bolstered in a myriad of ways the clients' safety, economic stability, health, and well-being.

Legal Aid Advancement Grants

Large amounts of civil legal needs remain unmet in Wisconsin, while IOLTA revenue remains high due to elevated interest rates. We awarded and distributed our second round of limited-term Legal Aid Advancement (LAA) grants to help more people access legal solutions in 2024.

COVID-19 Civil Legal Services

Low-income people in Wisconsin continue to confront a host of civil legal issues related to COVID-19. Our grants to address those needs are made possible by federal COVID-19 relief funds.

Wisconsin Help for Homeowners Legal Services

WisTAF manages the civil legal aid component of the state's effort to prevent homeowner mortgage delinquencies, defaults, foreclosures, loss of utilities or home energy services, and displacement of low- and moderate-income households related to the COVID-19 pandemic.

Afghan Immigration-related Legal Assistance

Ukrainian Immigration-related Legal Services

Wisconsin has a long tradition of offering a safe landing to people fleeing crisis abroad. To build their new, productive lives here, refugees navigate complicated, lengthy legal avenues. In 2024, WisTAF administered federal funds so eligible individuals fleeing crisis in Afghanistan and Ukraine can access professional legal assistance.

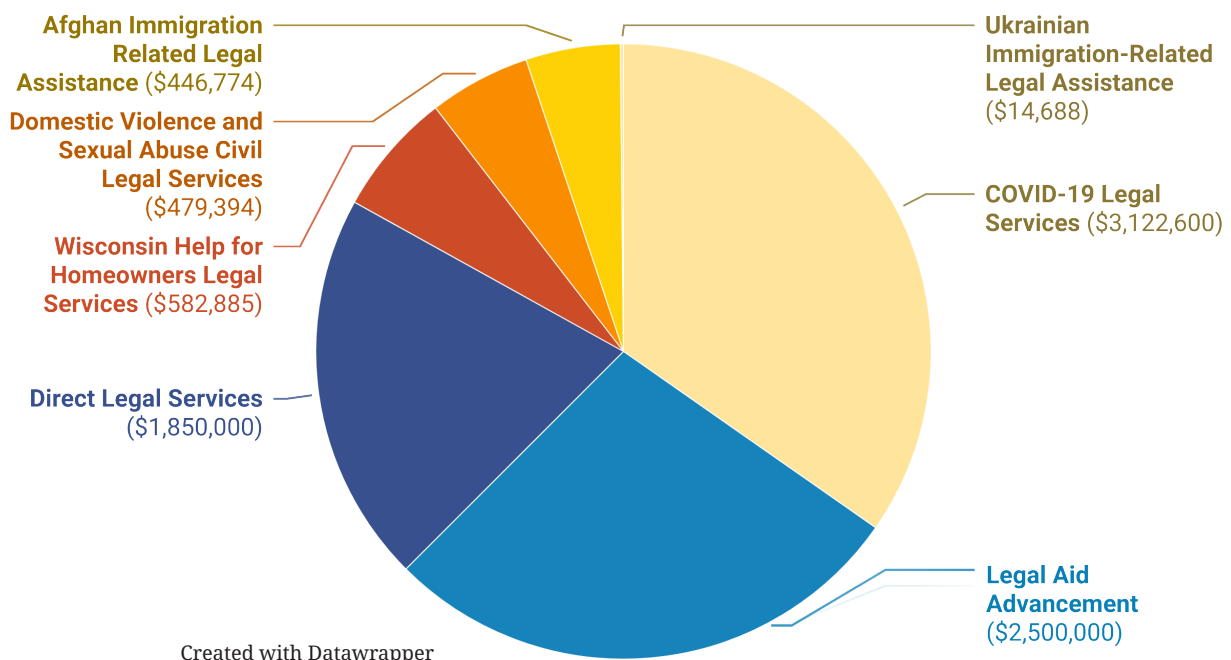
Domestic Violence and Sexual Abuse Civil Legal Services

The safety of an individual or family should not depend on their income. These grants helped clients address critical civil legal problems related to domestic violence and sexual abuse in this program, our only grants funded by the State of Wisconsin Biennial Budget.

Wisconsin Law Help

WisTAF is a primary funder of the new Wisconsin Law Help website (wislawhelp.org), the first unified statewide portal that helps people understand how to address their civil legal needs, including finding a provider if necessary.

Total Grant Disbursements by Program, 2024





At 24, Multiple Sclerosis had already forced Kendra to use a cane and struggle with basic functions. When her doctors recommended a stem cell transplant, she saw hope — until Medicaid denied coverage, calling it “experimental” despite medical evidence. Left immunocompromised after preparatory chemotherapy, Kendra reached out to ABC for Health and Disability Rights Wisconsin. **For a year, advocates fought through multiple appeals while Kendra remained in medical limbo.** In early 2024, persistence paid off. Medicaid approved the transplant, transforming Kendra’s life. “The difference is night and day!” she says, now able to walk her dog and enjoy family activities. “I don’t know how normal people are supposed to advocate by themselves in this system,” Kendra said.

Partnerships

Legal Community

Wisconsin’s legal community has a long history of demonstrating a strong sense of responsibility for access to justice — via contributions of both dollars and time. State Bar members contributed over \$900,000 to the Public Interest Legal Services Fund and donated thousands of hours of their time volunteering with WisTAF grantees and local free legal clinics around the state last year.

State Government

Everyone in Wisconsin reaps a benefit when legal processes are effective and efficient. WisTAF is proud to work with multiple state agencies as part of programs (see pages 5, 9) that invest in civil legal aid to provide access to justice, save future public costs, and achieve other public sector goals.

IOLTA Participating Financial Institutions

Banking institutions’ commitment to the communities they serve is reflected in their participation in the Interest on Lawyers’ Trust Accounts (IOLTA) program, which provides funding support for civil legal aid (see page 8). Of the 160 Wisconsin financial institutions maintaining IOLTA accounts during the past year, 137 waived all fees on the accounts so that 100 percent of interest payments helps people access justice. You can see the complete list at wistaf.org/IOLTA-list.



Prime Partner Program

Prime Partner financial institutions choose to make their communities stronger by paying interest rates in excess of those required for their IOLTA accounts. We are happy to have welcomed five new Prime Partners since the beginning of 2024.

People, and particularly law firms, help increase access to justice simply by banking with one of the financial institutions listed here.

Prime Partners (as of Publication)

Bank Five Nine	Forte Bank	Port Washington State Bank*
Bank of Sun Prairie	Huntington National Bank*	Pyramax Bank
CIBC	IncredibleBank	River Bank
Citizens Bank	Independence State Bank*	Signature Bank
Citizens Community Federal*	Landmark Credit Union*	West Pointe Bank
Coulee Bank*	Mound City Bank	
Farmers & Merchants Bank	Peoples State Bank (based in	
First Federal Bank of Wisconsin	Prairie du Chien)	

*Joined during 2024 or 2025.

Civil Legal Aid Alliance of Wisconsin

WisTAF is proud to serve in leadership roles in the Civil Legal Aid Alliance of Wisconsin, a collaborative effort of more than 20 access-to-justice organizations including many WisTAF grantees, the Wisconsin Access to Justice Commission, and more. WisTAF and the other participating organizations work toward a shared vision of all people capably accessing justice and achieving fair legal outcomes.

Philanthropy

Philanthropic goals related to helping people escape economic disadvantage often benefit from a legal aid component. Attorneys can professionally problem-solve for clients, a population sometimes unintentionally left behind by even the most laudable efforts. WisTAF shares this understanding in relevant networks and venues, additionally offering insight into the field with interested partners.

15-year-old “Emmie” lived with her grandfather for years before her mom moved her to Michigan, then immediately relocated to Chicago, leaving Emmie with strangers. After broken promises of reuniting, Emmie borrowed a phone and asked Grandpa to pick her up.

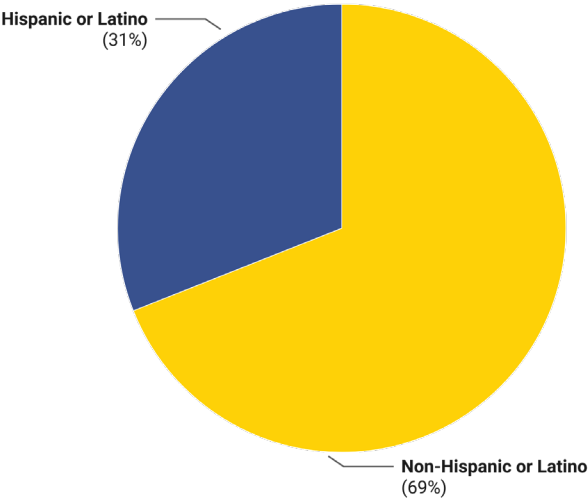
Back in Wisconsin, **Emmie requested counseling for suicidal thoughts, but Grandpa couldn’t secure care without legal guardianship.** Kids Matter Inc. helped arrange emergency guardianship so Emmie could get psychiatric care, then file for permanent guardianship.

Before the hearing, Mom removed Emmie from her psychiatric hospital — against medical advice and Emmie’s own wishes — and fled to another state. It took days of consulting with police across three cities, but Kids Matter finally located Emmie. Grandpa drove through the night to bring her home and now, Emmie is in psychiatric aftercare, seeing her therapist, and doing much better.

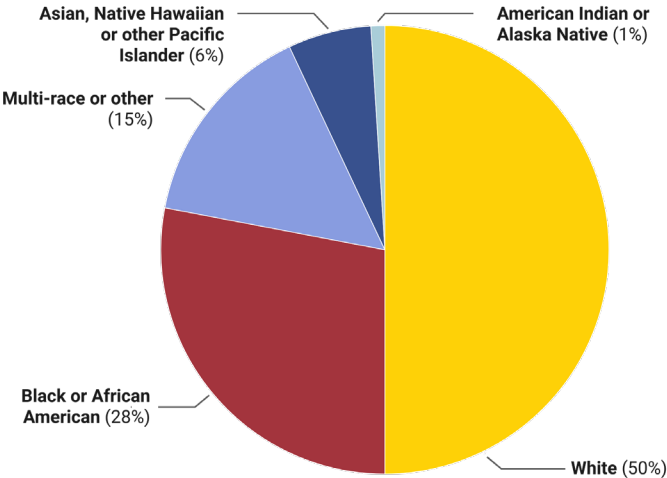


Client Demographics

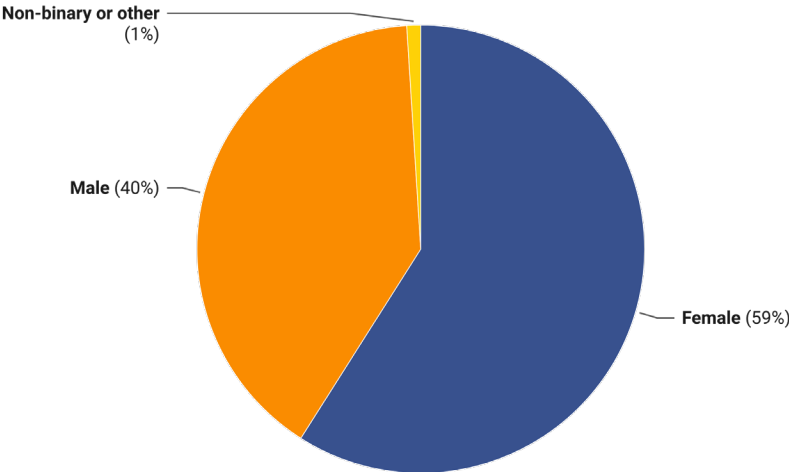
Clients by Ethnicity - All Programs



Clients by Racial Identity - All Programs



Clients by Gender – All Programs



Created with Datawrapper

Revenue Sources

Funds Generated by Legal Community

Interest on Lawyers’ Trust Accounts (IOLTA)

When Wisconsin law firms receive short-term or nominal deposits on behalf of clients or third parties, they store the funds in a single, pooled account known as an IOLTA account. Interest generated by IOLTA accounts comes to WisTAF to support civil legal aid.

Public Interest Legal Services Fund (PILSF)

The Wisconsin Supreme Court established the Public Interest Legal Services Fund (PILSF) to maintain “the integrity and efficiency of the judicial system within this state.” Directly attributable to the state’s attorneys and judges, PILSF funds are distributed throughout Wisconsin’s judicial districts. The Fund plays a critical role by supplementing erratic IOLTA funding

with a more stable revenue source for civil legal services for low-income Wisconsinites.

Pro Hac Vice

A portion of the *pro hac vice* admission fees paid by nonresident lawyers to participate in a particular action in Wisconsin is allocated to WisTAF to help offer civil legal aid.

Cy Pres

Wisconsin statutes require that WisTAF receive at least half of any residual funds left over from class action lawsuits filed in Wisconsin state court, to provide civil legal aid. Such residuals are called by the name of the applicable legal doctrine, *cy pres*. In addition, parties may name WisTAF as the recipient of other residuals, such as federal class actions, restitution, settlements, or penalties.

Limited Term Federal Funding

American Rescue Plan Act – State and Local Fiscal Recovery Funds (ARPA – SLFRF)

This funding addresses civil legal aid for COVID-related issues, and supports the Wisconsin Law Help portal.

American Rescue Plan Act – Homeowner Assistance Fund (ARPA – HAF)

This distinct COVID-19 relief fund allowed the State to create the limited-term Wisconsin Help for Homeowners program, within which WisTAF administers the Legal Services component.

Afghanistan Supplemental Appropriations Act (ASA)

The U.S. Congress provided this allocation in 2022 to help Afghan evacuees in Wisconsin secure their safety and stability by addressing related legal tangles.

Additional Ukraine Supplemental Appropriations Act (AUSAA)

Among the purposes of this 2022 federal appropriation was to support people displaced from Ukraine to the United States.

Recurring Federal Funds (State of Wisconsin Biennial Budget)

Temporary Aid for Needy Families (TANF)

Wisconsin’s legislators and governor invest a modest annual amount in federal Temporary Aid for Needy Families (TANF) funding for Domestic Violence and Sexual Abuse Civil Legal Services grants.

Other Private Sources

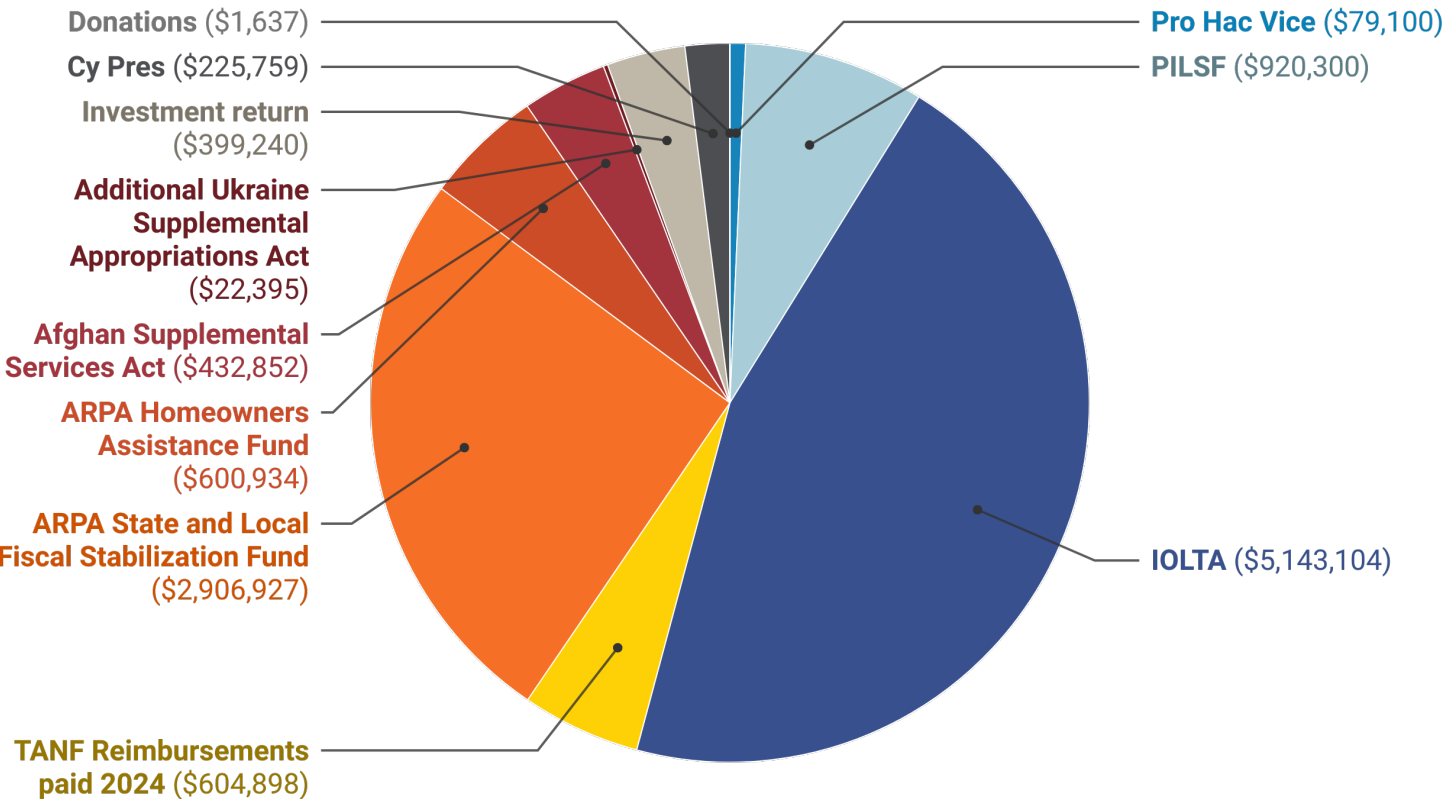
Investment Return

WisTAF earns revenue from investment of our operational reserves and occasional other funds.

Gifts

WisTAF is grateful to the individuals, foundations, and other entities that contribute to our work to provide access to justice.

Revenue by Fund Source, 2024



Created with Datawrapper

Grantee Organizations 2024

For a detailed report of 2024 grant disbursements, visit our Annual reports webpage, wistaf.org/annual.

Grantee	Area Served	Total Grants Disbursed, 2024*
ABC for Health	Statewide	\$752,115
Catholic Charities of the Archdiocese of Milwaukee	10 counties in southeastern Wisconsin	\$255,483
Catholic Charities of the Diocese of Green Bay	16 counties in northeastern Wisconsin	\$63,590
Catholic Charities of the Diocese of La Crosse	19 counties in western, southwestern, and central Wisconsin	\$31,500
Catholic Multicultural Center	11 counties in southcentral Wisconsin	\$120,878
Center Against Sexual & Domestic Abuse (CASDA)	Ashland, Bayfield, and Douglas counties	\$117,228
Centro Legal	Milwaukee and Waukesha counties	\$167,076
Community Immigration Law Center/Centro Hispano, Inc.	Madison area, limited services statewide	\$1,992
Community Justice, Inc.	14 counties in southern and southwestern Wisconsin	\$53,900
Disability Rights Wisconsin	Statewide	\$484,675
Golden House, Inc.	Brown and Kewaunee counties	\$44,406
Household Abuse Victims Emergency Network (HAVEN, Inc.)	Lincoln County	\$21,080
Indianhead Community Action Agency	9 counties in northern, northwestern, and northcentral Wisconsin	\$84,369
Judicare Legal Aid	33 counties in northern Wisconsin and 11 federally recognized Native American tribes	\$1,240,746
Kids Matter Inc.	Milwaukee and Waukesha counties, limited services statewide	\$438,838
Legal Action of Wisconsin, Inc.	39 counties in southern Wisconsin	\$3,644,575
Legal Aid Society of Door County	Door County	\$18,400
Legal Aid Society of Milwaukee, Inc.	Milwaukee County	\$704,429
LIFT Wisconsin	Statewide	\$272,713
LOTUS Legal Clinic, Inc.	Statewide	\$61,624
Milwaukee Justice Center	Milwaukee County	\$32,345
Portage County Legal Aid Society	Portage County	\$60,343
Rainbow House Domestic Abuse Services, Inc.	Marinette and Oconto counties	\$16,280
RISE Law Center of End Domestic Abuse Wisconsin	Statewide	\$75,613
The Women's Center	Southeastern Wisconsin	\$15,759
Vivent Health	Statewide	\$128,807
World Relief Fox Valley	Fox Valley	\$87,577
TOTAL		\$8,996,341

*Cash basis

Statement of Financial Position

ASSETS	2024*	2023*
Cash	\$5,915,486	\$2,749,226
Accounts and grants receivable.....	828,753	845,009
Prepaid expenses	18,323	25,902
Investments	2,347,557	1,711,592
Other assets	<u>117,850</u>	<u>4,848</u>
Total assets	<u>\$9,227,969</u>	<u>\$5,336,577</u>
LIABILITIES		
Grants payable	\$2,219,356	\$239,573
Accounts payable.....	5,791	10,314
Accrued expenses and other liabilities.....	<u>130,850</u>	<u>15,270</u>
Total liabilities	2,355,997	265,157
Net assets (without donor restrictions).....	<u>6,871,972</u>	<u>5,071,420</u>
Total liabilities and net assets.....	<u>\$9,227,969</u>	<u>\$5,336,577</u>

Statement of Activities

REVENUE		
Trust account interest income (IOLTA).....	\$5,143,104	\$4,278,020
Public Interest Legal Services Fund (PILSF).....	920,300	912,900
Grant revenue	4,568,006	5,296,510
Cy pres awards	225,758	163,966
Pro hac vice fees.....	79,100	87,200
Investment income	399,240	349,897
Other	<u>39,491</u>	<u>16,419</u>
Total revenue	<u>\$11,374,999</u>	<u>\$11,104,912</u>
EXPENSES		
Program services (grant awards program)	\$8,845,001	\$9,337,861
Supporting activities.....	<u>729,446</u>	<u>299,620</u>
Total expenses.....	<u>9,574,447</u>	<u>9,637,481</u>
Change in net assets without donor restrictions.....	1,800,552	1,467,431
Net assets – beginning of year	<u>5,071,420</u>	<u>3,603,989</u>
Net assets – end of year	<u>\$6,871,972</u>	<u>\$5,071,420</u>

**Figures for 2024 are unaudited; 2023 figures are audited. Audit is available upon request.*

**“I don’t know how normal
people are supposed to
advocate by themselves in
this system.”**

– Kendra, a Wisconsin civil legal aid client



investing in justice for all

Wisconsin Trust Account Foundation

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Scan this code to make a contribution to access to justice:



Our Mission

The Wisconsin Trust Account Foundation works with civil legal aid organizations in Wisconsin to increase access to justice. We oversee funds and invest in services and projects to help people resolve legal problems.

