Important Information Regarding Your 2018 Dues and Assessments

1. To assist the Wisconsin Supreme Court and avoid duplication of effort, your State Bar collects all the payments assessed by the Court in addition to your annual dues, including:
   - Board of Bar Examiners annual assessment
   - Office of Lawyer Regulation annual assessment and Annual Trust Account Certification
   - Wisconsin Lawyers’ Fund for Client Protection annual assessment
   - Public Interest Legal Services Fund annual assessment

2. Dues may be partially deductible as a business expense. For details, see last paragraph on back page.

3. Your dues and assessments payment must be received by July 1, 2017, to avoid late fees.
   By being proactive and responding to this mailing, you will also eliminate follow-up mailings.

4. Please provide us with your email address.
   Email is an efficient, cost-effective way for us to keep you informed on the latest developments at the Bar and other issues of importance to your practice. (Note: The State Bar of Wisconsin does not sell, rent, or exchange email addresses of its members and customers to outside organizations or businesses.)

5. Dues and Assessments may be paid by phone at (800) 728-7788. May - July.

6. New this year, dues may be paid online at wisbar.org. See dues online insert.

The Diversity and Inclusion Oversight Committee of the State Bar has requested that new demographic information be collected from all members. You will find this new section on the back of your statement. Please see the Committee’s insert for additional information.

For information and answers to Frequently Asked Questions regarding the annual dues statement, visit www.wisbar.org/memberfaq or call (800) 728-7788.
Section 2. Certifications. Please review this section carefully as there have been a number of changes since last year. There are now six certification statements from which to choose, including two relating to out-of-state lawyers.

Please be aware that more than one certification may apply to your situation. For example, if you have trust or fiduciary account(s) or safe deposit box(es) that are not identified in your law firm’s Certificate of Accounts and are not subject to an exception under SCR 20.1.15(m), you must identify each account or box in Section 1, and check Boxes a. and d. in Section 2.

Law Firm Certificate: (Not for use by solo practitioners) Pursuant to SCR 20.1.15(j)(2), a law firm must file a certificate of accounts on behalf of the lawyers in the firm. Note: The Law Firm Certificate of Accounts is available at: https://www.wicourts.gov/ under the “forms” drop-down menu. Select: Office of lawyer regulation from that menu to find the form.

Out-of-State Lawyers: An out-of-state lawyer who is licensed in the state in which he/she is primarily practicing is not required to maintain a Wisconsin trust account if the state in which the lawyer primarily practices has overturn certification requirements. [See SCR 20.1.15(b)(2).] See Box c, in Section 2. However, if this lawyer maintains a Wisconsin trust account, regardless of the fact that it is not required, the lawyer should identify the account in Section 1.

On the other hand, if a lawyer is licensed only in Wisconsin and is handling federal legal matters in another state, the lawyer must comply with Wisconsin’s trust account rules. [See SCR 20.8.5(b)(2)(i).] If that lawyer accepts funds in trust, he/she must maintain a Wisconsin trust account and identify the account in Section 1 of this form. See Box f, in Section 2. If this lawyer does not accept funds in trust, the lawyer should check Box f, in Section 2.

Section 3. Acknowledgments: Under SCR 20.1.15(i)(3), lawyers must acknowledge awareness of specific requirements under SCR 20.1.15. Please review the acknowledgments carefully. If you are unfamiliar with the requirements, please educate yourself prior to signing the Certification and Acknowledgements Statement. Acknowledgements may be directed to the Board even prior to the event of an investigation or proceeding relating to your management of trust property.

For further information, please contact the OLR Trust Account Program toll free at (877) 315-6941, Option 2; or in Madison at (608) 261-8296; or, go to the Trust Account Program web page: https://www.wicourts.gov/services/attorney/trust.htm.

Sections/Divisions. All available sections and divisions are listed on your form. Your current section and division memberships are already indicated with an X in the checkbox. Please review your selections and for those you wish to continue, do nothing. For those you wish to add, please check the box. For those you wish to discontinue, please draw a line through the name and checkbox. When you have completed your selections, please add the total cost of the memberships to LINE 8 on the front of your statement and add them into your total fees and dues.

Demographics Data. The State Bar of Wisconsin Diversity Task force is requesting that all State Bar of Wisconsin members supply basic demographic information. In the Demographics Data section, please check the box next to each selection that applies to you. Please check all choices that apply. Please send questions regarding the Demographic Data portion of the statement to diversitytaskforce@wisbar.org.

Areas of Practice. Write in your top 5 areas of practice from the choices listed. Also fill in the percentage of time spent practicing in each area, and circle your focus in that area of practice.

Focus of Practice. We recognize that for some areas of practice, the focus of practice should be directed to the Boards. For example, Transactional/Advisory and Torts/Personal Injury is Litigation. But for others, such as Insurance or Labor/Employment, there are lawyers who do no litigation and others who do only litigation. Rather than list transactional and litigation versions of various areas of practice, we made that a separate question. Please indicate the focus of your areas of practice. Please check all that apply.

Please return this statement with your check or credit card authorization in the envelope provided. If more than one attorney’s fees are paid by company check or credit card, all statements covered must be returned. State Bar dues and Supreme Court assessments are not deductible as charitable contributions but may be deductible as business expenses. Internal Revenue Code section 6033(e)(1) requires certain organizations to notify members that a portion of dues is allocable to lobbying activities. We are uncertain whether the requirement applies to the State Bar of Wisconsin. If it does, this statement will serve as notice that 5.4% of the current State Bar membership dues payment and either $8.50 for lobbying or $2.75 for the lobby LITE program of certain section dues, noted on the statement with an asterisk, relate to lobbying and would not be deductible.