

# Important Information Regarding Your 2023 Assessments and Dues

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, 2022.**

By being proactive and responding to this mailing, you will eliminate follow-up mailings and avoid possible late fees.

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 State 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.)*

5. **Dues may be paid online at [wisbar.org](http://wisbar.org).**

6. **Dues and assessments may be paid by phone at (800) 728-7788.**

For information and answers to **Frequently Asked Questions** regarding the annual assessments and dues statement, visit [www.wisbar.org/memberfaq](http://www.wisbar.org/memberfaq) or call **(800) 728-7788**.

## Diversity and Inclusion Oversight Committee Demographic Data Request

Dear State Bar Member,

In keeping with the State Bar's commitment to diversity and inclusion as affirmed by the Board of Governors, we are asking you to voluntarily provide Demographic Data on the enclosed dues statement. This information will help us to share information about programs of interest, help members connect with each other, and track our progress in improving diversity and inclusion. As the instructions indicate, please check all of the demographic categories that apply to you. The State Bar will not update your public profile to include such information nor will it disseminate members' personally identifiable information unless you opt-in to share this information. Please see the *Administrative Policies and Procedures of the State Bar* for more information.

We encourage all members to complete the Demographic Data section with your renewal submission. If you prefer, you may directly update your Demographic Data on [www.wisbar.org](http://www.wisbar.org) on the *myProfile* page of the *myStateBar* section.

As part of the continuing efforts of the Diversity and Inclusion Oversight Committee, the State Bar has compiled a list of the Wisconsin specialty bars and legal associations for those who may be interested in joining these bars and associations. This information is available at [www.wisbar.org/specialtybar](http://www.wisbar.org/specialtybar).

These bars and associations include, but are not limited to:

1. Association for Women Lawyers
2. Association of Women Lawyers in Brown County
3. Justinian Society of Lawyers – WI Chapter
4. Legal Association for Women
5. LGBT Bar Association of Wisconsin
6. National Association of Black Women Lawyers - WI Chapter
7. Wisconsin Asian American Bar Association
8. Wisconsin Association of African American Lawyers
9. Wisconsin Hispanic Lawyers Association
10. Indian Law Section (please contact Craig Jolly, State Bar Section Coordinator, at (608) 250-6190 or [cjolly@wisbar.org](mailto:cjolly@wisbar.org))

Please note that this list is not exhaustive. If you are aware of a Wisconsin specialty bar or legal association that should be included in the list or have an interest in starting a new specialty bar or legal association, please contact the State Bar Liaison to the Diversity and Inclusion Oversight Committee, Jacque Evans at (608) 250-6083 or [jevans@wisbar.org](mailto:jevans@wisbar.org).

In providing this information, we hope to foster more communication and awareness of possible networking opportunities.

Sincerely,

Cheryl Daniels  
President

Margaret Wren-Hickey  
President-elect



STATE BAR OF WISCONSIN

# INSTRUCTIONS

**Line 1 & 2. Supreme Court Board Assessments.** At the Supreme Court’s direction, the State Bar includes assessments for the two Supreme Court Boards (i.e. Board of Bar Examiners and Office of Lawyer Regulation) with the State Bar membership and assessments statement. They operate under the supervision of the Supreme Court, and inquiries concerning their activities should be directed to the Boards. Judicial class members other than Supreme Court justices and emeritus inactive members (70 and older who have filed a written request for enrollment in the emeritus inactive class) do not pay assessments.

Assessments have been calculated based on your member class. Failure to pay Board assessments will result in the suspension of the lawyers’s Wisconsin law license.

**Line 3. Wisconsin Lawyers’ Fund for Client Protection.** SCR 12.07 requires every attorney to pay such annual assessments as are necessary to maintain a fund balance of \$250,000. The protection fund committee has determined the assessment shown on line 3 will be required for this fiscal year to maintain that balance. This assessment is based on member class and includes emeritus members. Failure to pay this assessment will result in the suspension of the attorney’s Wisconsin law license. Only lawyers classified as inactive on this statement are exempt from this assessment.

**Line 4. Public Interest Legal Services Fund.** In 2005, the Supreme Court amended SCR 10.03(5)(a) to require this assessment for all active members. In 2008, the court extended this assessment to include judicial members. See [www.wisbar.org/wistaf](http://www.wisbar.org/wistaf) for additional information.

**Line 5. State Bar Dues.** Attorneys pay State Bar dues approved by the Board of Governors; emeritus inactive members (70 and older who have filed a written request for enrollment in the emeritus inactive class) are exempt from dues. Your dues have been calculated for you, based on your member class. Inactive membership is not available to members who practice law in Wisconsin. If you need to change your member class, please contact Customer Service at (800) 728- 7788. Failure to pay State Bar dues will result in suspension of the lawyer’s Wisconsin law license.

**Line 6. Late Fee.** A \$50 late fee will be assessed after the due date.

**Line 7. Subtotal of Required Fees.** Pay this amount to retain your Wisconsin law license. It is the subtotal of the State Bar dues and Supreme Court assessments.

**Line 8. Section and Division Memberships.** Your current section and division memberships are indicated with an “x.” To make changes, please cross out sections and mark the boxes for new sections. Members under 36 years of age or during the first five years following admission to the State Bar, irrespective of age, are automatically members of the Young Lawyers Division (with the ability to opt out); out of state members are automatically members of the Nonresident Lawyers Division (with the ability to opt out); and members who receive a salary from a government unit may join the Government Lawyers Division. Every member who is 60 years of age or older is eligible for membership in the Senior Lawyers Division. Membership to this division is not automatic. The amount due for your section and division memberships should be calculated and entered on line 8.

**Line 9. Wisconsin Law Foundation Contribution.** To make a contribution to the Wisconsin Law Foundation, please choose one of the contribution levels and enter your payment on line 9. Contributions are tax deductible. Smaller contributions are also accepted and appreciated.

**Line 10. Subtotal.** Add lines 7, 8, and 9 and enter the new total on line 10.

**Line 11. Optional Dues Reduction Relating to Nonchargeable Activities.** Active members admitted to their first Bar April 30, 2018 or earlier, voting judicial members, and Supreme Court justices can withhold the full reduction; active members admitted to their first Bar after April 30, 2018, senior active members and inactive members can withhold one-half of the full reduction; non-voting judicial members can withhold two-thirds of the full reduction. The reduction has been calculated for you based on your member class. Emeritus members are not eligible for the reduction as no State Bar dues are paid. See enclosed insert regarding the reduction amount for this year and the determination of activities that are nonchargeable. Members who take the reduction should initial line 11.

**Line 12. Total.** If you choose to take the reduction, subtract line 11 from line 10 and enter the new total on line 12. If no reduction is taken, enter the amount from line 10 on this line.

**Business/Residence/Electronic Information.** Article I, Section 1 of the State Bar Bylaws requires members to keep their residence and principal office addresses current at all times. Please review the information and make additions or corrections in the space provided. Be sure to include your email address if available. Business and electronic information (or residence if there is no business) will be used to create your listing in the Wisconsin Lawyer Directory and will be available on our website using Lawyer Search. The State Bar does not sell phone, fax, or email information.

## Trust Account/WisTAF Certificate & Acknowledgments.

Under SCR 20:1.15(i)(4) and (k)(11), failure to complete the trust account certificate and acknowledgments is grounds for automatic suspension from the practice of law in the same manner as for nonpayment of dues.

**Section 1. List of Accounts.** Please identify the name, address, and telephone number of each financial institution in which you maintain a trust account, fiduciary account, or safe deposit box in Wisconsin. Identify how many of each type of account you maintain by inserting the number of trust accounts, fiduciary accounts, or safe deposit boxes under the box labeled **I, F** or **S**. For example, if you have three trust accounts, including an IOLTA, insert “**3**” under box **I**. If you have accounts at more than two financial institutions, please attach a separate list to the Certificate and place a check mark in the box stating that a list is attached. Trust accounts opened after filing this Certificate must be reported on next year’s Certificate.

**Section 2. Certifications.** Please review this section carefully. All lawyers must check Box **a.** or **b.** 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 the location of each account or box in Section 1, and check **Boxes c.** and **e.** in Section 2.

**Law Firm Certificate:** (*Not for use by solo practitioners*) Pursuant to SCR 20:1.15(i)(2), a law firm must file a certificate of accounts with the State Bar on behalf of the lawyers in the firm. **Note:** The Law Firm Certificate of Accounts is available at: <https://www.wicourts.gov/forms1/olr.htm>.

**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 overdraft notification requirements. [See SCR 20:1.15(b)(2)]. See, **Box f.** in Section 2. However, if this lawyer maintains a Wisconsin trust account, regardless of the fact that it is not required, the lawyer must 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 g.** in Section 2. If this lawyer does not accept funds in trust, the lawyer should check **Box d.** 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 Certificate and Acknowledgments. These statements may be admissible in 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](mailto: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 will be obvious, e.g., Estate Planning is Transactional/Advising 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 8.2% 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.