

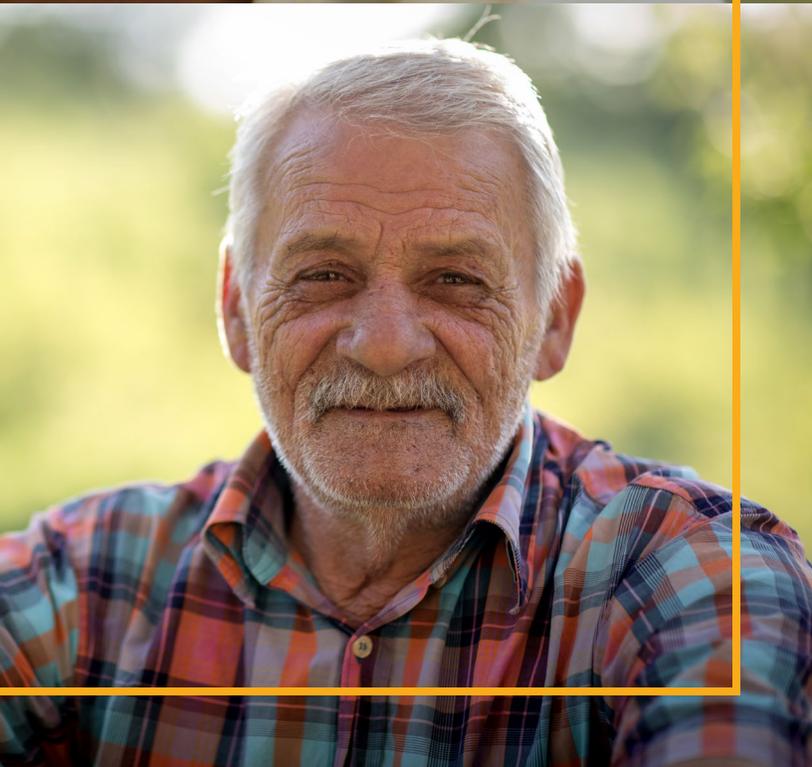
2018 ANNUAL REPORT

Funding the Promise of Justice for All



SUPREME COURT OF PENNSYLVANIA

Pennsylvania Interest on
Lawyers Trust Account Board





2018 Annual Report

Awarding grants that support the provision of free legal assistance to low income Pennsylvanians in civil matters where a basic human need, such as access to shelter, nutrition, or health care, is at stake.

Dear Friends & Colleagues,

We are pleased to present the Annual Report of the Pennsylvania Interest on Lawyers Trust Account (IOLTA) Board.

Since the inception of the IOLTA Program in Pennsylvania, more than \$295 million has been awarded in grants to nonprofit legal aid organizations, county bar associations, and law school clinical programs in support of their tireless efforts to ensure that access to justice is a reality for all, not just those who can afford legal representation.

Legal aid attorneys, law students, and advocates working at the IOLTA Board's 45 grantee organizations, as well as hundreds of dedicated *pro bono* attorneys, represent low-income Pennsylvanians in all 67 counties in a variety of civil matters affecting basic human needs such as preventing home foreclosures, putting a stop to illegal eviction practices

and utility shut-offs, removing barriers to employment, and supporting survivors of domestic violence. The programs that provide these services strengthen communities across the Commonwealth by empowering low-income and disadvantaged individuals to build the foundational capacity to obtain safe housing and sustain employment.

2018 marked the first year of the special grant program resulting from the distribution of funds from a U.S. Department of Justice litigation settlement with Bank of America. These restricted, one-time funds support special efforts to target the delivery of legal assistance for foreclosure prevention and community redevelopment in communities both rural and urban that were hit hardest by the foreclosure crisis. Currently, our Bank of America grants are directing strategic attention and resources to places like Northern Schuylkill County, Northwest Philadelphia, Lackawanna, Lawrence, and Bradford Counties. The IOLTA Board will continue to administer the program over the next four years, providing an additional \$9 million in Bank of America settlement funds to legal aid organizations to deliver targeted legal services to areas in the Commonwealth most affected by the foreclosure crisis.

This past April, the Supreme Court of Pennsylvania adopted Pennsylvania Rule of Professional Conduct 1.15(v), which directs unclaimed and unidentifiable funds in IOLTA accounts to the IOLTA Board for safekeeping so that they continue to serve the beneficial purpose of the IOLTA program, pending their owner's rightful claim. This important rule adoption would not have been possible without the leadership and dedication of our former Board Chair Irwin W. Aronson, Esq., to whom we extend our deepest thanks. Many

other supporters and partners, including the Pennsylvania Bar Association, Pennsylvania Legal Aid Network, Pennsylvania's law schools and county bar associations, helped to make this success possible.

We also want to thank the growing group of Platinum Leader Banks, which evidence their commitment to IOLTA's mission by paying premium yields on IOLTA accounts.

Finally, we are deeply grateful to the Chief Justice and Associate Justices of the Supreme Court of Pennsylvania, as well as the Appellate and Common Pleas Jurists and Magisterial District Judges in every corner of our Commonwealth, for their unwavering support of our common desire for equal justice under the law.

Sincerely,



Gretchen L. Kelly

Gretchen L. Kelly, Esq.

CHAIR



Stephanie S. Libhart

Stephanie S. Libhart

EXECUTIVE DIRECTOR

Oversight and Key Activities

2017-2018 FISCAL YEAR

Program Administration

The IOLTA Board administers several court-directed and legislative-directed funding streams to accomplish our mission of supporting the provision of civil legal services to low-income and disadvantaged Pennsylvanians. One source of funding is generated by the interest produced on attorneys' IOLTA accounts. In fiscal year 2017-2018, the IOLTA Board received account activity reports and interest remittances for an average of 14,405 IOLTA accounts per month. The IOLTA Board also processed 155 *pro bono* contributions, which are voluntary donations made by attorneys for the purpose of funding civil legal aid. Additionally, 1,698 *pro hac vice* admission applications were processed for out-of-state attorneys seeking to appear in Pennsylvania courts, the fees from which fund IOLTA's Loan Repayment Assistance Program to help legal aid attorneys manage their student debt.

Grant Oversight

Detailed, recurring reviews are conducted on IOLTA grantee organizations in order to ensure accountability for the efficient use of the limited public funds for civil legal aid. In fiscal year 2017-2018, the IOLTA Board received and reviewed 267 Grantee Performance Reports, which involves evaluating the delivery of services and monitoring expenditures. The IOLTA Board also reviews the audited financial statements of our grantees and performs site visits at their offices. Additionally, in order to boost efficacy in the expenditure of both court-directed and legislative-directed funding, grantees must participate in a competitive grant application process, and grant recipients must execute agreements formalizing their commitment to adhere to program requirements and establishing consequences for failing to do so.

14,405

average number of IOLTA accounts processed monthly by the IOLTA Board.

12

financial institutions
underwent compliance
assessments.

Attorney & Financial Institution Compliance

Each year, the IOLTA Board notifies approximately 1,500 newly licensed Pennsylvania lawyers of their IOLTA responsibilities. Additionally, the Board monitors attorney compliance with the IOLTA requirements. Through its compliance monitoring processes, the IOLTA Board provided technical assistance to more than 3,633 attorneys to help them maintain compliance in fiscal year 2017-2018.

Compliance assessments are also conducted to assist financial institutions with their obligations regarding interest rates, service charges, and account reporting in accordance with the IOLTA regulations. During fiscal year 2017-2018, 12 financial institutions underwent compliance assessments.

3,633

attorneys helped to
maintain or achieve
compliance.

267

grantee performance
reports received and
evaluated by the
IOLTA Board.

Unclaimed & Unidentifiable Funds

New Rule Provides Direction to Attorneys with Unclaimed Funds in their IOLTA Account.

After several years of receiving calls from attorneys seeking guidance on the ethical distribution of unclaimed and unidentifiable funds in their IOLTA trust account, the IOLTA Board is pleased to share that recently adopted Pennsylvania Rule of Professional Conduct 1.15(v) provides such guidance. It is an especially common question when an attorney is winding down a law practice in preparation for retirement or when his or her attempts to contact a former client are unsuccessful.

The new rule provides that after reasonable efforts have been undertaken to reunite funds in an IOLTA account with their rightful owner for at least two years, any unclaimed or unidentifiable funds may be transferred to the IOLTA Board for safekeeping. The funds may be reclaimed if the rightful owner is identified or located at a later time.

Directing unclaimed and unidentifiable funds to the IOLTA Board advances the mission of funding civil legal assistance for low-income and disadvantaged Pennsylvanians since the beneficial interest from the funds remains a source of legal aid funding.

The IOLTA Board is deeply grateful to the Supreme Court of Pennsylvania, our former Board Chair Irwin W. Aronson, Esq., the Pennsylvania Bar Association, Pennsylvania Legal Aid Network, Pennsylvania State University — Penn State Law, University of Pennsylvania Law School, Widener University Commonwealth Law School, Allegheny County Bar Association, Erie County Bar Association, Philadelphia Bar Association, Washington County Bar Association, and many others who helped to make this possible.

Bank of America Grant Program

2018 was the inaugural year of the Bank of America Grant Program.

In 2016, the IOLTA Board received nearly \$12.2 million pursuant to a settlement involving the U.S. Department of Justice, six states, and Bank of America. The funds are restricted for foreclosure prevention legal assistance and community redevelopment legal assistance.

After studying the impact of foreclosure on communities across Pennsylvania, the IOLTA Board developed four targeted grant programs to respond to the hardship created by the crisis.

In the category of community redevelopment legal assistance, grant funds advance a comprehensive, coordinated approach to addressing problems faced by communities most impacted by the foreclosure crisis. Grant-funded work in each community includes community outreach, a needs assessment, a response plan, and coordinated data collection.

Grant funds dedicated to foreclosure prevention legal assistance provide representation in foreclosure cases and bankruptcy and tangled titled matters and to victims of land installment contracts and other predatory lending scams.

As a result of the foreclosure crisis, many former homeowners find themselves competing for limited affordable and decent housing. In response, a portion of the grant funds support representation for low-income individuals and families facing eviction or denial of rental housing, habitability issues, housing discrimination, and/or displacement due to gentrification.

Lastly, an additional allocation of funding was set aside to address systemic issues related to the housing crisis.

In 2018, fifteen grants totaling \$2,681,495 were awarded under the Bank of America Grant Program.

IN 2018, OVER

\$2.6m

was awarded under the Bank of America Grant Program.

Pro Bono Initiative Grant Program

In 2001, the Supreme Court of Pennsylvania asked attorneys licensed to practice law in Pennsylvania to voluntarily contribute a minimum of \$50 annually to help fund the infrastructure necessary for organized county-based *pro bono* programs, paving the way for the Pennsylvania IOLTA Board's *Pro Bono Initiative Grant* program.

Since the start of the initiative, the IOLTA Board has distributed a total of \$823,000 in grants. Due to a decrease in contributions, the Supreme Court of Pennsylvania retired the *Pro Bono Initiative Grant* program, awarding its final grant this year.

The IOLTA Board recognizes that many attorneys make donations directly to legal services agencies and *pro bono* organizations. Nevertheless, the IOLTA Board encourages all attorneys to aspire to fulfill their professional responsibility to provide legal services to those unable to pay. With only one legal aid lawyer for every 6,415 people living in poverty, *pro bono* representation by private attorneys is an enormously valuable supplement to the services of civil legal aid programs.

The IOLTA Board remains proud of the work that has been accomplished under this program. Many indigent Pennsylvanians have been helped by its existence. We are especially grateful to those who made this work possible, including both the attorneys who donated to the fund as well as those who donated their valuable time to this honorable cause.

Future contributions to the IOLTA Board will support general grantmaking to Pennsylvania's legal aid organizations and law schools. To make a donation, visit our website at www.paiolta.org/donate.

Counties Benefited by Pro Bono Initiative Grants

Allegheny County

Beaver County

Bedford County

Berks County

Blair County

Bradford County

Bucks County

Butler County

Cambria County

Carbon County

Chester County

Clarion County

Clinton County

Crawford County

Cumberland County

Dauphin County

Delaware County

Forest County

Franklin County

Greene County

Indiana County

Lackawanna County

Lawrence County

Lebanon County

Montgomery County

Lehigh County

Luzerne County

Lycoming County

Monroe County

Montgomery County

Northampton County

Perry County

Philadelphia County

Pike County

Sullivan County

Susquehanna County

Tioga County

Venango County

Warren County

Washington County

Wayne County

Westmoreland County

Wyoming County

York County

Regional Grants

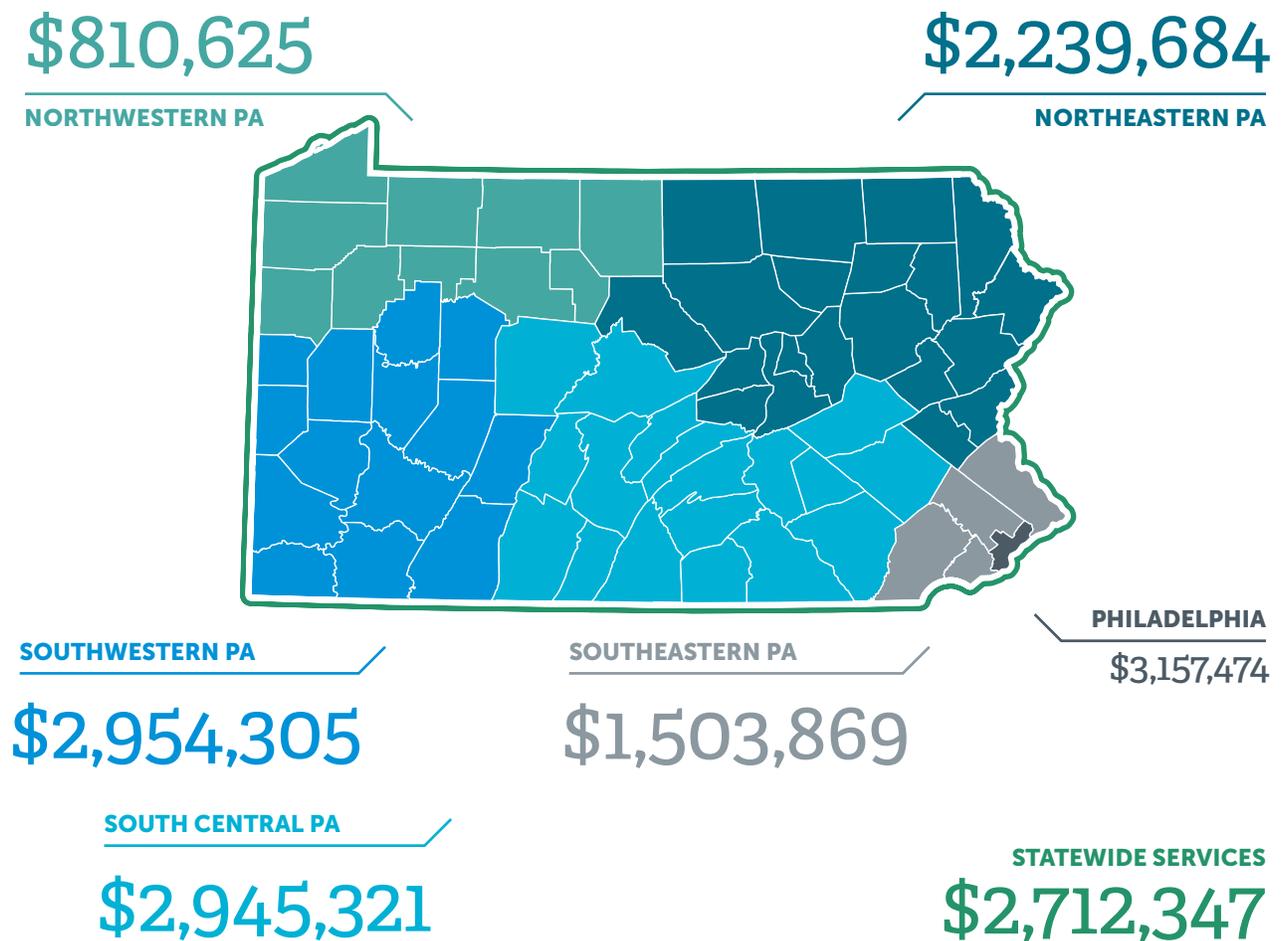
Middle District of Pennsylvania
Bankruptcy Bar Association

Statewide Grants

Montgomery Child Advocacy Project
Pennsylvania Bar Association

Financial Impact of Grants by Region

The IOLTA Board is committed to funding programs that increase access to justice for all Pennsylvanians. As a result, funds awarded to legal services organizations are allocated based on the geographical proportion of people living in poverty throughout the state. This method ensures that funds are distributed fairly and support services where poverty exists.



Grant Recipients

Organization	Grant
AIDS Law Project of Pennsylvania	\$19,100
Allegheny County Bar Foundation	\$104,600
Community Justice Project	\$474,479
Community Legal Services of Philadelphia	\$2,807,066
Consumer Bankruptcy Assistance Project	\$35,640
Disability Rights Pennsylvania	\$42,120
Education Law Center	\$52,290
Franklin County Legal Services	\$50,800
Friends of Farmworkers	\$370,754
Homeless Advocacy Project	\$15,000
KidsVoice Pennsylvania, Inc.	\$62,700
Lackawanna Pro Bono, Inc.	\$50,000
Laurel Legal Services, Inc.	\$704,299
Legal Aid of Southeastern Pennsylvania, Inc.	\$1,398,969
Legal Clinic for the Disabled, Inc.	\$60,000
Legal Services for Immigrants & Internationals	\$50,000
MidPenn Legal Services	\$2,630,032
Neighborhood Legal Services	\$1,476,408
North Penn Legal Services	\$1,988,401
Northwestern Legal Services	\$720,625
Pennsylvania Health Law Project	\$331,554
Pennsylvania Immigration Resource Center	\$174,000
Pennsylvania Institutional Law Project	\$523,512
Pennsylvania Legal Aid Network, Inc.	\$785,542
Pennsylvania HIAS Indigent Immigrant Legal Services	\$54,900
Philadelphia Legal Assistance Center, Inc.	\$25,000
Philadelphia Volunteers for the Indigent Program	\$75,950
Public Interest Law Center	\$50,000
Regional Housing Legal Services	\$526,568
SeniorLAW Center	\$92,900
Southwestern Pennsylvania Legal Services, Inc.	\$480,498
Support Center for Child Advocates	\$62,950
Women Against Abuse Legal Center	\$42,458
Women's Center & Shelter Civil Law Project	\$50,000
Legal Services Organizations	\$16,389,115

Grant Recipients **CONTINUED**

Organization	Grant
Pennsylvania Bar Association	\$15,000
Pro Bono Initiatives	\$15,000
Drexel University Thomas R. Kline School of Law	\$177,800
Duquesne University School of Law	\$177,800
Pennsylvania State University Dickinson School of Law	\$177,800
Pennsylvania State University Penn State Law	\$177,800
Temple University Beasley School of Law	\$177,800
University of Pennsylvania Law School	\$177,800
University of Pittsburgh School of Law	\$177,800
Villanova University Charles Widger School of Law	\$177,800
Widener University Commonwealth Law School	\$177,800
Law School Clinical and Internship Programs	\$1,600,200
Pennsylvania Bar Foundation	\$477,455
Loan Repayment Assistance Program (LRAP)	\$477,455

MORE THAN

\$1.6 million

awarded to Law School Clinical and
Internship programs

Grant Recipients **CONTINUED**

Organization	Grant
Community Justice Project	\$176,342
Community Legal Services of Philadelphia	\$271,184
Franklin County Legal Services	\$50,750
Friends of Farmworkers	\$53,717
Legal Aid of Southeastern Pennsylvania, Inc.	\$239,722
Legal Clinic for the Disabled, Inc.	\$50,750
MidPenn Legal Services	\$371,487
Neighborhood Legal Services	\$88,096
North Penn Legal Services	\$200,000
Northwestern Legal Services	\$72,765
Philadelphia Volunteers for the Indigent Program	\$50,750
Public Interest Law Center	\$60,343
Regional Housing Legal Services	\$653,223
SeniorLAW Center	\$125,750
Southwestern Pennsylvania Legal Services, Inc.	\$216,616
Bank of America Surplus Distribution Program	\$2,681,495
Legal Services Organizations	\$16,389,115
Pro Bono Initiatives	\$15,000
Law School Clinical and Internship Programs	\$1,600,200
Loan Repayment Assistance Program (LRAP)	\$477,455
Bank of America Surplus Distribution Program	\$2,681,495
Total 2017-2018 Grants	\$21,163,265

MORE THAN
\$21.1 million
 awarded in grants in fiscal year 2017-2018.

The Pennsylvania
Utility Law Project

Protecting the Rights of Domestic Violence Victims

Establishing and maintaining utility service can be a significant challenge for many families.

When you add domestic and economic abuse into the equation, the challenges of maintaining, restoring, or starting utility service are intensified.

Despite the Responsible Utility Customer Protection Act, which allows victims of domestic violence to avoid liability for utility debt accrued in someone else's name, all too often, low-income victims are not aware of their rights and protections.

Elizabeth Marx, supervising attorney for the Pennsylvania Utility Law Project (PULP), knew about the Act's uneven enforcement and witnessed how utility issues often prevented survivors from starting over. She and her colleagues developed and

implemented a three-year pilot program in partnership with domestic violence organizations in Northeast Pennsylvania to help victims secure and maintain affordable, reliable utility service through training, education, and representation.

Since 2015, PULP's pilot program has been a tremendous success, resulting in assistance to over 950 individuals spanning 10 counties with matters ranging from preventing improper utility termination, enrollment in utility assistance programs, and access to energy efficiency assistance. In total, PULP's advocacy generated more than \$150,000 in benefits to the households it served. The program also provided training for victim

**Names and photos have been changed to protect the privacy of clients.*



FROM JULY 1, 2015 TO JUNE 30, 2018

182

PULP successfully
reconnected and/or prevented
termination of utility
service for 182 domestic
violence survivors.

*2015-2018 Caseload Statistics of the
Pennsylvania Utility Law Project*

advocates, utility staff, and social workers, including the creation of a utility advocate's manual for domestic violence advocates.

In addition to the positive impacts felt by the individuals and families receiving assistance, the pilot program also worked to identify critical systemic changes and solutions to ensure that survivors' rights are protected across Pennsylvania. This systemic advocacy resulted in several high impact changes.

In one case, it changed the business practices of a utility company that serves almost 600,000 residential customers in Pennsylvania to ensure that victims are protected from the loss of utility services

as they heal from the trauma of domestic violence. In another case, PULP's advocacy resulted in \$500,000 more annually in energy efficiency assistance available to low-income households. Additionally, PULP worked to ensure that customers enrolled in the utility's assistance program were not charged higher rates for service through the competitive market.

Together, these reforms help ensure that victims can access and maintain affordable utility services while navigating a difficult and often life-altering transition to a safe and healthy home.

Increasing Access to Critical Services and Benefits

Navigating an increasingly complex state and federal bureaucracy can pose significant challenges for low-income and disabled individuals.

Something as simple as lacking a government-issued photo identification card can be the single barrier to someone gaining access to government benefits, affordable housing or temporary shelters, hospital care, and employment. Many times, individuals find themselves in a bizarre Catch-22 when attempting to access critical services: they need their birth certificate to obtain a photo ID, but are told they need a photo ID to obtain a “delayed” birth certificate.

Recognizing the impact this has on low-income individuals, Philadelphia Volunteers for the Indigent Program (Philly VIP) — which enlists volunteer attorneys to serve clients *pro bono* — developed a niche in helping clients who lack government-issued identification.

Among the volunteer attorneys powering the initiative is Marc Zucker, Esq., a long-time volunteer with Philly VIP.

Essie, a visually impaired client, was advancing on a waiting list for subsidized housing. When it was discovered that she had no birth certificate or photo ID, she was pushed to the back of the list — years of waiting gone to waste. In the meantime, the rooming house where she lived burned down. With expedited action, Attorney Zucker secured a court order and helped Essie obtain a photo ID. She was ultimately able to find affordable subsidized housing.

**Names and photos have been changed to protect the privacy of clients.*

IN FISCAL YEAR 2017-2018

204

An IOLTA-funded grant supported the recruitment of 204 new volunteer attorneys who accepted a case from Philadelphia VIP.

2017-2018 Caseload Statistics of Philadelphia VIP



Breaking Down Barriers to Healthcare

At just fourteen months old, Steven battled for his life as a result of complications from hydrocephalus, a condition in which fluid accumulates in the brain. The shunt placed in his brain shortly after his birth to reduce fluid pressure had burst and needed to be replaced.



IN FISCAL YEAR 2017-2018

4,466

IOLTA-funded initiatives at Pennsylvania's nine law schools supported legal advice, brief services, and/or extended legal representation in 4,466 cases.

*2017-2018 Caseload Statistics of the
Pennsylvania IOLTA Board*

His mother Alice, a young, single parent from Cambria County, applied for supplemental security income (SSI) benefits to help finance Steven's care. Despite the fact that Steven's condition had caused him to be legally blind and endure developmental delays, Alice's application on behalf of her son was denied.

Fortunately, the law students at the University of Pittsburgh School of Law's Health Law Clinic took on her case. In her appeal, the students successfully argued that Steven was disabled, and the denial of Steven's SSI benefits was reversed.

Now, Alice is able to focus more on Steven's care and development and worry less about making ends meet.

When benefits are wrongfully denied or terminated, the consequences for children and their caregivers can be significant given the range of health care costs that are not covered by insurance. In its three years of operation as a medical-legal partnership, Pitt Law's Health Law Clinic has won five SSI appeals.

Loan Repayment Assistance Program

In 2017, the PA IOLTA Board awarded a three-year, \$1,715,170 grant to the Pennsylvania Bar Foundation (PBF) to administer a Loan Repayment Assistance Program (LRAP) to help legal aid attorneys manage their student loan debt.

MORE THAN
\$2.5 million
in loan assistance has been distributed since 2010.

The goal of the LRAP is to assist IOLTA-funded legal aid organizations in recruiting and retaining the best and brightest attorneys to represent low-income and disadvantaged Pennsylvanians by making it possible for legal aid attorneys to manage their often substantial student loan debt as they continue to serve the public interest. Attorneys receive a loan, which has been or will be forgiven when he or she completes a full year of legal aid employment. Funding for the program is provided by *pro hac vice* fees paid by out-of-state attorneys who wish to make an appearance in a Pennsylvania court.

The LRAP was established by the Supreme Court of Pennsylvania and is administered by the Pennsylvania IOLTA Board in collaboration with the Pennsylvania Bar Foundation. Since its inception in 2010, 799 loans valued at more than \$2.5 million have been distributed to 256 legal aid attorneys employed by 33 IOLTA-funded civil legal services organizations located across Pennsylvania.

SINCE 2010

256

legal aid lawyers received a loan which has been or will be forgiven when the lawyer completes a full year of legal aid employment.

“IOLTA’s Loan Repayment Assistance Program is incredibly helpful to me as it allows me to do meaningful, much needed legal work on behalf of indigent detained individuals facing deportation.

As is the case with many public interest firms, the salaries for attorneys in this field are modest compared to the private sector, which is necessitated by the need to minimize operational costs to in turn extend legal services to a greater number of people.

LRAP helps fill the financial gap for attorneys, like me, who have stepped into this arena. Public interest attorneys stand in the legal gap to provide much needed services, and LRAP helps make ends meet, providing the financial support for us to choose to do the meaningful and desperately needed work that we undertake. It is remarkable and encouraging to have my work and livelihood supported by such a program. Thank you!”

—RYAN BRUNSINK, ESQ.

*Managing Attorney of the Pennsylvania
Immigration Resource Center*

Impact of Platinum Leader Banks

Platinum Leader Banks voluntarily provide a premium yield above and beyond the minimum comparable rate required to participate in Pennsylvania's IOLTA program.

Choosing to maintain your IOLTA account at a Platinum Leader Bank increases the amount of interest available for legal aid services in communities across Pennsylvania. In fact, a law firm's decision to maintain their IOLTA account at a Platinum Leader Bank has a significant impact on the legal profession's overall ability to self-fund legal assistance for indigent Pennsylvanians without resorting to increasing attorney registration fees, court filing fees, or relying on legislatively appropriated funds.

As of June 30, 2018, a law firm's IOLTA account with a Platinum Leader Bank will earn a 1.31% interest rate, as compared to other institutions that provide a rate on IOLTA accounts closer to .17%. Over twelve months, that could be the difference between earning \$85 versus nearly \$655 for a firm with an average of \$50,000 in its IOLTA account. If just two firms with similar balances moved their IOLTA accounts to Platinum Leader

Banks, the resulting increase in interest available for IOLTA grants would fund legal aid representation in a Protection From Abuse hearing for a victim of domestic violence who might otherwise receive no representation while attempting to navigate the judicial system during one of the most trying and frightening periods of their life.

This important public-private partnership also plays a significant role in facilitating community redevelopment by providing increased funding for important civil legal aid services in low-income and disadvantaged communities across the Commonwealth.

The greater funding available to legal aid services helps communities avoid safety net costs that would otherwise be incurred in assisting low-income individuals struggling with legal issues like housing, employment, and access to credit.

To join the campaign and demonstrate your support of funding for legal aid, transfer your IOLTA account to one of our Platinum Leader Banks and contact the IOLTA Board so that your firm can be featured on our website through the "I Bank on Justice" campaign.

Platinum Leader Banks

AS OF JUNE 30, 2018

ACNB Bank

American Bank

AmeriServ Financial Bank

Brentwood Bank

Centric Bank

CFS (Charleroi Federal Savings) Bank

Congressional Bank

Enterprise Bank

Fidelity Savings & Loan Bucks County

First Priority Bank

First Resource Bank

FNB Bank, N.A.

Fulton Bank, N.A.

Huntingdon Valley Bank

Juniata Valley Bank

Lafayette Ambassador Bank

Mifflinburg Bank & Trust

MoreBank, a division of Bank of Princeton

Muncy Bank & Trust Company

New Tripoli Bank

Parke Bank

Somerset Trust Co.

Standard Bank, PASB

Swineford National Bank

Tioga Franklin Savings Bank

Tompkins VIST Bank

Washington Financial Bank

Susquehanna Community Bank

Woori America Bank



Financial Highlights

2017-2018 FISCAL YEAR

FROM 1989 TO JUNE 30, 2018

\$295.8 million

awarded in grants since the inception of the
Pennsylvania IOLTA Board.

\$325,507

remitted in class action residual funds that support the provision of civil legal services to the poor and disadvantaged by serving as a source of funding for grants.

\$2,681,495

awarded in the first year of the Bank of America grant program to nonprofit legal aid organizations to support community redevelopment and foreclosure prevention legal assistance.

Schedule of Revenue, Expenses, and Change In Net Assets

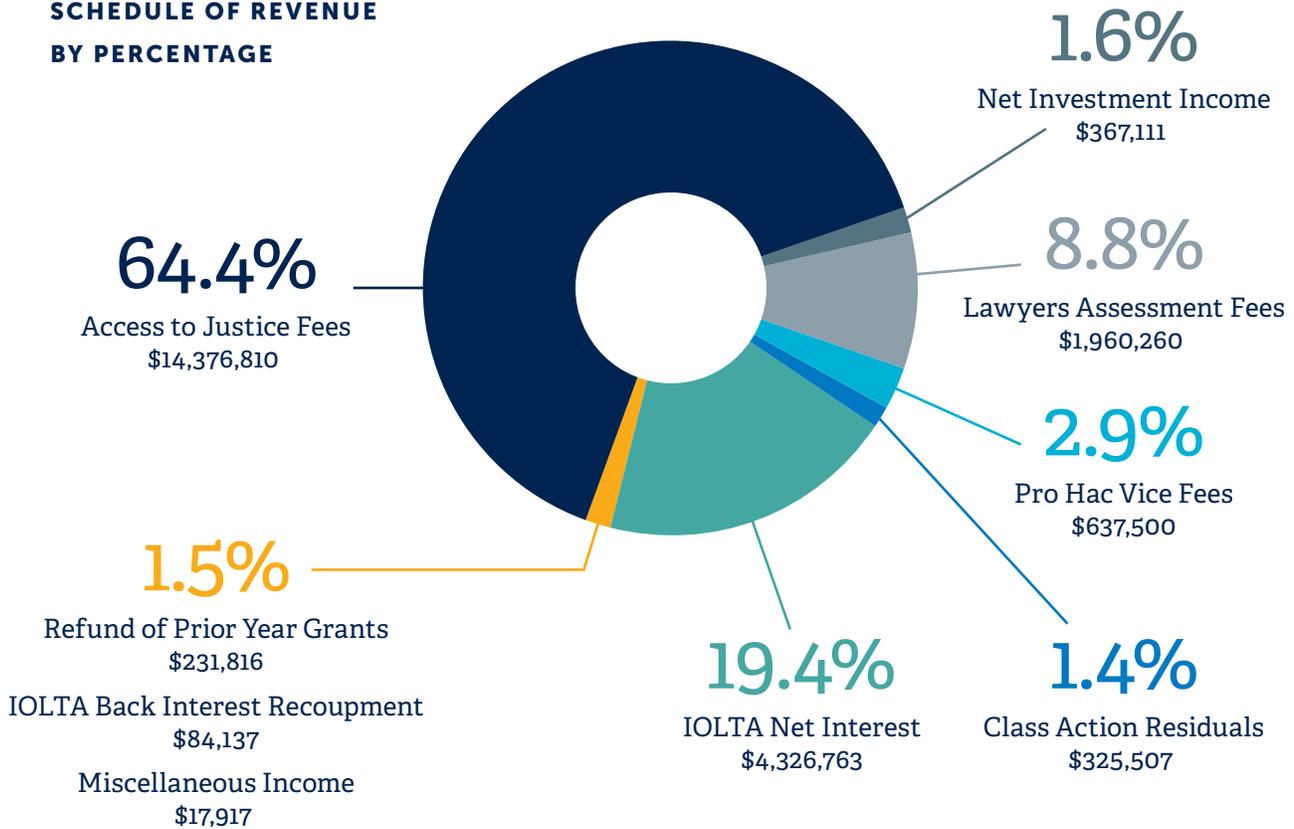
2017-2018 FISCAL YEAR

	IOLTA	AJA	Bank of America Surplus	Bank of America Donation	Pro Bono	Pro Hac Vice	Property	Total
REVENUE								
IOLTA Net Interest	\$4,326,763	\$0	\$0	\$0	\$0	\$0	\$0	\$4,326,763
Access to Justice Fees	\$0	\$14,376,810	\$0	\$0	\$0	\$0	\$0	\$14,376,810
Pro Hac Vice Fees	\$0	\$0	\$0	\$0	\$0	\$637,500	\$0	\$637,500
Lawyers Assessment Fees	\$1,960,260	\$0	\$0	\$0	\$0	\$0	\$0	\$1,960,260
Class Action Residuals	\$325,507	\$0	\$0	\$0	\$0	\$0	\$0	\$325,507
Net Investment Income	\$259,555	\$107,556	\$0	\$0	\$0	\$0	\$0	\$367,111
Miscellaneous Income	\$17,917	\$0	\$0	\$0	\$0	\$0	\$0	\$17,917
IOLTA Back Interest Recoupment	\$84,137	\$0	\$0	\$0	\$0	\$0	\$0	\$84,137
Refund of Prior Year Grants	\$203,184	\$0	\$0	\$28,632	\$0	\$0	\$0	\$231,816
Total Revenue	\$7,177,323	\$14,484,366	\$0	\$28,632	\$0	\$637,500	\$0	\$22,327,821
EXPENSES								
Program Administration	\$631,725	\$94,622	\$48,616	\$22	\$92	\$0	\$898	\$775,975
Grant Awards								
Legal Services Organizations	\$3,422,036	\$12,300,000	\$2,681,495	\$667,079	\$0	\$0	\$0	\$19,070,610
Law Schools	\$1,600,200	\$0	\$0	\$0	\$0	\$0	\$0	\$1,600,200
Pro Bono Initiative Grants	\$0	\$0	\$0	\$0	\$15,000	\$0	\$0	\$15,000
Loan Repayment Assistance Program	\$0	\$0	\$0	\$0	\$0	\$477,455	\$0	\$477,455
Total Grant Awards	\$5,022,236	\$12,300,000	\$2,681,495	\$667,079	\$15,000	\$477,455	\$0	\$21,163,265
Total Expenses	\$5,653,961	\$12,394,622	\$2,730,111	\$667,101	\$15,092	\$477,455	\$898	\$21,939,240
Change in Net Assets	\$1,523,362	\$2,089,744	(\$2,730,111)	(\$638,469)	(\$15,092)	\$160,045	(\$898)	\$388,581
Acquisition of Property	(\$15,824)	(\$2,364)	\$0	\$0	\$0	\$0	\$18,188	\$0
Net Assets — Beginning	\$9,419,204	\$12,523,356	\$12,126,271	\$638,469	\$15,092	\$1,485,397	\$0	\$36,207,789
Net Assets — Ending	\$10,926,742	\$14,610,736	\$9,396,160	\$0	\$0	\$1,645,442	\$17,290	\$36,596,370

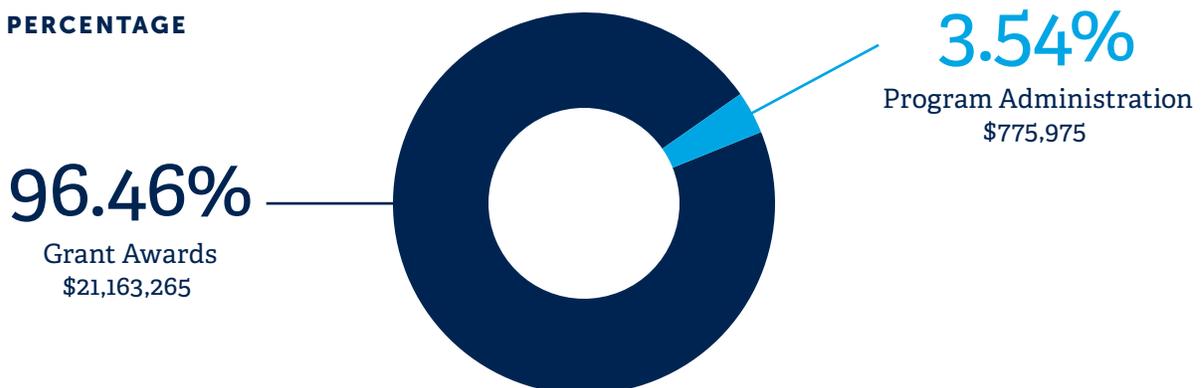
By the Numbers

2017-2018 FISCAL YEAR

SCHEDULE OF REVENUE BY PERCENTAGE



SCHEDULE OF EXPENSES BY PERCENTAGE



Board of Directors

2017-2018 FISCAL YEAR



Irwin W. Aronson, Esq.

CHAIR

Willig, Williams & Davidson



Gretchen L. Kelly, Esq.

VICE-CHAIR

*The PNC Financial
Services Group, Inc.*



Alan M. Feldman, Esq.

TREASURER

*Feldman Shepherd Wohlgernter
Tanner Weinstock Dodig, LLP*



Honorable Ourania Papademetriou

SECRETARY

*Court of Common Pleas of
Philadelphia County*



Honorable Katherine B. Emery

*Court of Common Pleas of
Washington County*



Forest N. Myers, Esq.

Forest N. Myers Law Offices



David S. Posner, Esq.

*Goldfarb, Posner, Beck,
Dehaven & Drewitz*



Barry M. Simpson, Esq.

Pennsylvania Bar Association



Stella L. Smetanka, Esq.

*University of Pittsburgh
School of Law*

Chief Justice Thomas G. Saylor



It has been the long-standing mission of the Pennsylvania Supreme Court to ensure that justice is fair and accessible to everyone and as such, the Court remains committed to supporting the provision of civil legal aid to those in need.

In addition to the contributions to civil legal aid through the IOLTA portion of our annual licensing fee, the Court encourages lawyers and other legal practitioners to further support this mission, whether financially or through pro bono services.”



JUSTITIA

FLO

VIRTUE

LIBERTY AND

INDEPENDENCE



SUPREME COURT OF PENNSYLVANIA

Pennsylvania Interest on Lawyers Trust Account Board

MAILING ADDRESS

PA IOLTA Board
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