

**Carrie Janto - Fwd: PROPOSED CHANGES TO THE TRUST ACCOUNT RULES**

**From:** Julie Rich  
**To:** Janto, Carrie  
**Date:** 4/10/2007 2:56 PM  
**Subject:** Fwd: PROPOSED CHANGES TO THE TRUST ACCOUNT RULES

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06-04

&gt;&gt;&gt; "Annie Schwartz" &lt;aschwartz@prmk.com&gt; 4/10/2007 2:40 pm &gt;&gt;&gt;

Re: Proposed Changes to the Trust Account Rules

Dear Members of the Court:

As you are aware, I have been serving on the Trust Account Working Group that drafted the original petition to amend the trust account rules. As you also know, we have made some changes to that petition in response to the feedback we received, both from the public and other members of the Bar. At your request, we appointed citizen members to the group, we further publicized the proposed changes, and we presented them for feedback and for discussion with other lawyers.

At this point, I believe that the revised version we are proposing provides a number of advantages, both for attorneys and for clients. The proposed changes would eliminate some very troubling ambiguities in the current rule by clarifying definitions and procedures. It provides a very specific method for dealing with many disputes about fees in a way that would protect both clients' interests and the interests of the lawyers and law firms that elect to follow the proposed procedures, and it deals with some specific problems encountered by specific practice groups. The proposal will also have an intended consequence, in my personal opinion, in that it will eliminate many fee dispute issues that currently come to the Office of Lawyer Regulation by establishing a procedure that will give clients and lawyers a faster, more efficient method of resolving such disputes without a formal OLR investigation.

I would submit that our proposal provides better protection for Wisconsin citizens and clients than the current version, and I believe it is a very workable rule for our members, despite its "first glance" complexity. I apologize that I will not be present in person during the public hearing on the proposed changes, but I had earlier made plans to spend this time with my wife in Arizona. I urge you to approve these changes, and I look forward to your response to the actions we took at your suggestions. Thank you.

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