

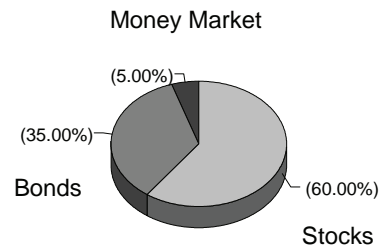


WHAT IS UP AT WisPACT?

Investment Report

All WisPACT accounts over \$5,000 are invested in stocks, bonds and money market funds. The Trustee compares the returns on these investments to Lipper averages that measure how the markets did. The Lipper averages are used by many investment managers, trustees and mutual funds as performance benchmarks.

WisPACT Investments



So, how did the Trustee do?

The net annual returns for 2005 and 2006 averaged 7.35% per year.

After deducting all fees, returns averaged 7.35% per year for 2005 and 2006; about the same as the 7.39% Lipper benchmark and better than certificates of deposit (CDs).

Annual interest rates on six-month CDs were 2.73% in 2005 and 5.24% in 2006 according to the Federal Reserve Bank. So, after fees were deducted, your account would have grown about the same as the stock and bond markets. If your account was opened or had distributions during 2005 or 2006, its return would have differed. Future returns will also differ and cannot be predicted from past returns.

Planning a Vacation?

Would you like to take a trip? Would you like to have your trip paid out of your WisPACT trust account? Usually you have to put money down or pay a deposit to make reservations for a trip. Now you can make reservations without putting money down.

WisPACT has made arrangements with the agencies listed in this article so no immediate deposit is required to make reservations. These agencies specialize in travel for people with disabilities.

Please call Terry Penniston during the planning stages. We ask that you plan your trip 4-6 weeks in advance. If you have any questions or would like to discuss vacation plans, call Terry at (608) 255-2577.

To find out what trips are available, you can go to the agencies' web sites or call them to request their catalogs be sent to you.

The Guided Tour, Inc.
www.guidedtours.com
1-800-783-5841

Trips, Inc.
www.tripsinc.com
1-800-686-1013

AbleTrek Tours
www.abletrektours.com
1-608-524-3021

Search Beyond Adventures
www.searchbeyond.com
1-800-800-9979

TURN OVER TO CONTINUE





600 Williamson Street, Suite J, Madison, WI 53703
Phone: 608-268-6006, Fax: 608-252-8449
Website: www.wispact.org

House Hunting

Have you ever thought about owning your own home? Talking to a Housing Counselor at Movin' Out, Inc. is a good first step. You can call them toll-free at 1-877-861-6746. Check out their web site at www.movin-out.org.

Movin' Out, Inc. partners with people seeking to improve their housing situation. Movin' Out, Inc. housing counselors help people with disabilities and their families craft an individualized housing plan. For almost a thousand households this has meant either purchasing housing or coordinating necessary modifications to owner-occupied housing. The scope of housing counseling could include any or all of the following:

- Exploring whether to own or rent
- Prioritizing location preferences and needs
- Looking at affordability and calculating budgets to account for expenses such as property taxes, insurance and home maintenance
- Evaluating eligibility for down payment assistance programs and rehab funding options
- Considering the impacts of housing resources and choices on public benefits, SSI, SSDI, Medicaid and Medicaid waiver programs
- Helping home buyers complete applications for home ownership financing
- Consulting with attorneys, lenders and realtors chosen by the applicant
- Negotiating with developers, landlords and contractors regarding special adaptations for health or physical accessibility needs
- Evaluating impacts on taxes, estates and wills, and working with families who want their home deeded to their family member with a disability (This would involve outside professionals as Movin' Out does not give legal or tax advice.)
- Linking with support service providers to coordinate housing and support needs.

Funds from your WisPACT trust account can be part of the housing plan developed by Movin' Out if approved by the Trustee. If you have questions or want to discuss buying a house with funds in your WisPACT trust account, you should talk to the WisPACT Executive Director at 608-268-6006 ext. 4.

Weekly Distributions Checks are a SUCCESS

As you know we pilot tested mailing distribution checks every Tuesday, starting on January 2, 2007. It was a SUCCESS!! We will be continuing this permanently. With that there are new Request for Distributions Forms. As of July 1, 2007 we will no longer be accepting old forms. Please use the new forms which have been enclosed. Please make sure to make copies or go to our website to download one at www.wispact.org under the Advisors tab.

Just a reminder that Request for Distributions need to be received by end of the day Tuesday and approved for payment for checks to be mailed the following Tuesday.

We accept your requests by mail or fax. Emails are not accepted at this time, but we are hoping to in the future. Our fax number is 608-252-8449. The \$25 emergency distribution fee will apply to requests for checks to be mailed on a day other than the next Tuesday in the weekly cycle.

Our **NEW** Request for Distribution Form is enclosed. Please use the new form not the previous versions.

Thank you, WisPACT, Inc.