



By including the Northwoods Land Trust in your will or estate, you'll leave a lasting legacy of land for generations to come.

# **NORTHWOODS LEGACY SOCIETY**

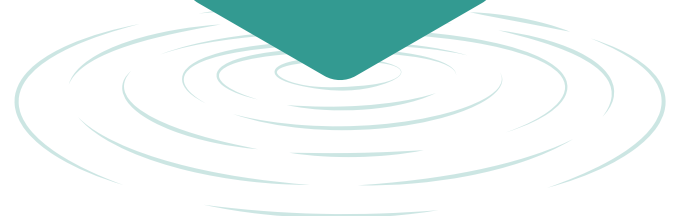


Intention  
Form  
Enclosed

Northwoods Land Trust

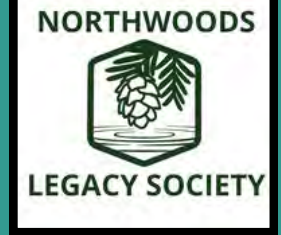
(715) 479-2490

[www.northwoodslandtrust.org/legacy](http://www.northwoodslandtrust.org/legacy)





# LEAVE YOUR LEGACY



## Introduction

Including the Northwoods Land Trust (NWLTL) in your will, estate, or financial plans is one of the finest ways to secure your legacy. By doing so, you will leave a gift that will last forever through land preservation in northern Wisconsin.

Bequest options may involve designating a specific asset, specific amount, or percentage of an estate to benefit NWLTL in your will.

Bequests can involve gifts of cash, stocks, bonds, real estate, or other assets. You can name NWLTL as beneficiary of a retirement, bank, brokerage, or donor-advised fund account.

Legacy gifts are the perfect way to advance the pace of land and water protection during this time of unprecedented change. Legacy gifts, once made, are the primary way NWLTL builds its capacity to protect more land, and at a faster rate.

There is no limit to the amount you can leave to a charity such as NWLTL. Legacy gifts to NWLTL are free from federal estate tax and may therefore offer significant estate tax benefits.

*See the enclosed examples of bequest language.*

## How to join

If you are planning to include (or have already included) NWLTL as a beneficiary in your will, estate plans, or financial plans, please let us know by filling out the **Legacy Gift Intention Form**. (*The form is not legally binding.*)

Once you return the enclosed intention form, we will welcome you as a member of the Northwoods Legacy Society!

By sharing your intentions with NWLTL, we can best plan for your gift, and give you assurance that your gift can be accepted (especially in the case of property).

### RECOGNITION


Recognition for Society members includes a listing in NWLTL's Annual Report in the year joined, and on NWLTL's webpage dedicated to the Society.

We honor requests for anonymity if you'd prefer to not be named in publications or on the website. See

[www.northwoodslandtrust.org/legacy](http://www.northwoodslandtrust.org/legacy)



"Legacy gifts are incredibly impactful. They protect what makes the northwoods special." -Willa Schmidt, a conservation easement donor, has included NWLTL in her will to continue to support conservation into the future.



# What matters most is what you leave *behind*

## Legacy gifts may be offered through



### Will or trusts

Bequests can involve designating specific assets, amounts, or percentages of an estate to NWLT in your will or trust. Assets may include cash, stocks, bonds, real estate, or other assets, or you can name NWLT as residual beneficiary of your estate.

Planning for gifts of such designated assets can allow them to be excluded from probate values, which may make the job of the executor of your will easier. Depending on current federal and state estate tax provisions, bequests may also reduce estate tax liabilities for your heirs.

### Real estate

Making plans today for a bequest of a home, cottage, or house lot can be an easy, straightforward means to dispose of property upon your passing while supporting causes that are meaningful to you.

*If you are considering a bequest of land to be preserved for conservation purposes, we prefer to work with you up front to ensure that we would be able to protect the property consistent with your intentions.*

### Life insurance plans

Life insurance plans can name NWLT as a full or partial beneficiary. You can do so by simply contacting your insurance agent. This type of gift may come with eligible tax savings. Or, gift a fully paid-up life insurance policy outright to NWLT.

### Retirement, brokerage & bank accounts

One of the most simple and flexible ways to leave your legacy is by designating NWLT as a beneficiary of your retirement or financial accounts.

Eligible accounts include:

- Retirement, IRA, 401(k) & 403(b) accounts
- Brokerage accounts & donor-advised funds
- CDs
- Money market, savings & checking accounts

### Charitable remainder trusts

Name NWLT as a beneficiary in your charitable remainder trust. A charitable remainder trust is a tax-exempt irrevocable trust designed to reduce the taxable income of individuals.

A charitable remainder trust dispenses income to one or more noncharitable beneficiaries for a specified period of up to 20 years, and then donates the remainder to the charitable organization(s) at the end of the term.

### Carl's Legacy

Carl Anderson bequeathed 22 acres of land to NWLT with Wisconsin River flowage frontage – property he cherished for 63 years before his passing in 2008.

NWLT sold the property subject to a conservation easement, permanently protecting the land and providing funds to NWLT's invested reserves.





**35%**

**of NWLT's annual income may come from invested reserve funds.**

**New bequests significantly grow these funds, allowing the land trust to grow too.**

**So more woods, waters & wildlife are protected and cared for through bequests.**

**The Northwoods Legacy Society is dedicated to those who leave a bequest upon their passing to the Northwoods Land Trust.**

- We recommend that you contact a tax advisor to learn how giving options relate to your specific circumstances. Advisors can help you decide if setting a percentage, fixed dollar amount, or specific asset is right for you. Setting a percentage allows your charitable giving to adjust with your changing life circumstances.
- The Northwoods Land Trust applies legacy gifts to support conservation priorities outlined by our strategic plan or to grow reserve funds, unless otherwise agreed upon with a legacy donor.
- To make a meaningful planned gift during your lifetime, such as a required minimum distribution from an IRA, visit our website 'Support' page for options or contact us.

**For legal purposes, our organization is described as:**

Northwoods Land Trust, Inc., a nonprofit organization organized and existing under the laws of the State of Wisconsin, and with a current business mailing address of P.O. Box 321, Eagle River, WI 54521-0321.

The federal identification number is 31-1776860.

The Wisconsin Certificate of Exempt Status number is CES# 008-0001908280-04.

**View the enclosed attachment for examples of bequest language.**



**Enroll with the Intention Form to officially join the Northwoods Legacy Society!**

Please contact Ted Anchor, Executive Director at (715) 479-2490 or [nwlt@northwoodslandtrust.org](mailto:nwlt@northwoodslandtrust.org) to discuss options.



**THANK YOU!**

[www.northwoodslandtrust.org/legacy](http://www.northwoodslandtrust.org/legacy)

# Examples of Bequest Language

*The information provided here is general in nature, applicable to wills and trusts.*

## **Portion of estate:**

“I give to the Northwoods Land Trust, Inc., a nonprofit organization organized and existing under the laws of the State of Wisconsin, and with a current business mailing address of PO Box 321, Eagle River, WI 54521-0321, \_\_\_\_\_% of my estate to be used by the Northwoods Land Trust, Inc. for purposes related to its mission of land protection and stewardship.”

## **Residual estate (after other bequests are named):**

“I give to the Northwoods Land Trust, Inc., a nonprofit organization organized and existing under the laws of the State of Wisconsin, and with a current business mailing address of PO Box 321, Eagle River, WI 54521-0321, the rest and residue of my estate to be used by the Northwoods Land Trust, Inc. wherever the need is greatest.”

## **Specific amount:**

“I give to the Northwoods Land Trust, Inc., a nonprofit organization organized and existing under the laws of the State of Wisconsin, and with a current business mailing address of PO Box 321, Eagle River, WI 54521-0321, the sum of \$ \_\_\_\_\_ to be used by the Northwoods Land Trust, Inc. wherever the need is greatest.”

## **Specific real estate:**

“I give to the Northwoods Land Trust, Inc., a nonprofit organization organized and existing under the laws of the State of Wisconsin, and with a current business mailing address of PO Box 321, Eagle River, WI 54521-0321, all of my right, title and interest in the following described real estate [*insert legal description of property*].”

If you are considering a gift of land to be preserved for conservation purposes, and have verified that we can honor your intentions, you would add “*to be used by the Northwoods Land Trust, Inc. for conservation purposes*” to the end of the above statement.

## **Specific assets:**

“I give to the Northwoods Land Trust, Inc., a nonprofit organization organized and existing under the laws of the State of Wisconsin, and with a current business mailing address of PO Box 321, Eagle River, WI 54521-0321, the following described assets to be used by the Northwoods Land Trust, Inc. wherever the need is greatest [*insert description of assets to be included such as stocks, bonds, proceeds from retirement plans or life insurance, art, non-conservation lands and buildings, vehicles, boats and other equipment, or any other valuable tangible personal assets*].”

## **Retirement, brokerage and bank accounts:**

To name the Northwoods Land Trust to receive a portion or all of your unused or remaining assets in these account types, simply list Northwoods Land Trust, Inc. Tax ID: 31-1776860, \_\_\_\_\_%.

Federal ID #: 31-1776860; WI Certificate of Exempt Status CES# 008-0001908280-04



NORTHWOODS



LEGACY SOCIETY

# Legacy Gift Intention Form

Thank you for your interest in leaving your legacy through land preservation with the Northwoods Land Trust. Sharing your intentions helps us understand your wishes, and recognize you in the **Northwoods Legacy Society**. This Intention Form is not legally binding, and you can change or revoke it at any time.

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

I/We have made; or will make a provision including the Northwoods Land Trust in my will or estate plan in the following way(s):

*If possible, please disclose specific information about your intended gift below. Estimate the approximate value in today's dollars or note if the provision is percentage based.*

Will or Living Trust: \$\_\_\_\_\_ Insurance Policy: \$\_\_\_\_\_

Real Estate: \$\_\_\_\_\_ Retirement Asset/IRA: \$\_\_\_\_\_

Other Asset(s): \$\_\_\_\_\_ Description: \_\_\_\_\_

Are you willing to share a copy of the document(s) naming NWLT as a beneficiary? If yes, please include a copy, or send once ready. Yes No

How would you like to be recognized in the **Northwoods Legacy Society**?

I/We would like to be listed as Society member(s). Please list my/our name(s) as:

\_\_\_\_\_

I/We would like to remain anonymous in publications related to the Northwoods Legacy Society.

**Signature(s):**

\_\_\_\_\_ **Date:** \_\_\_\_\_

\_\_\_\_\_ **Date:** \_\_\_\_\_

The Northwoods Land Trust applies legacy gifts to support conservation priorities outlined by our strategic plan unless otherwise agreed upon with a legacy donor. Our EIN # is: 31-1776860.

Questions? Contact Ted Anchor, Executive Director at (715) 479-2490 or [nwlt@northwoodslandtrust.org](mailto:nwlt@northwoodslandtrust.org)



Please return this form to: Northwoods Land Trust, PO Box 321, Eagle River, WI 54521

**Thank you!**