



The Gift that Lasts Forever



PRESERVING LAND
THROUGH
PLANNED GIVING
& ESTATE PLANNING

Our Lives have been Enriched...

“Our lives have been enriched by our rural heritage—its stone fence-lined fields, its cedar forests, its rolling farmland, and majestic lakes. Those of us who know the area, we have been the recipients of great and often undisturbed beauty. There are fewer and fewer places like it in the world. You and I have an obligation and opportunity shared by few generations.”

Susan Buchanan
Executive Director,
Tall Pines Conservancy



You are Creating a Legacy...

By including Tall Pines Conservancy in your estate planning, you are protecting the natural beauty and ecological health of our area for future generations. Along with your financial gift, you are giving...

- * The gift of clean water and air***
- * The gift of space to learn about and enjoy first-hand the wonders of nature***
- * The gift of solace and respite in a busy world***
- * The gift of inspiration for artists, writers, naturalists and all who appreciate natural beauty***



Planned Giving

Will/Trust Gifts

One of the single most important ways you can help Tall Pines is through your will or trust. The simple insertion of a clause in your will or trust can create a lasting legacy and help Tall Pines accomplish its mission in the future. You can name Tall Pines as the direct beneficiary of a specific amount of money, of specific assets, or of a portion of your estate after other payments are made. Gifts to Tall Pines are free from federal estate tax, and there is no limit on the amount you can leave to Tall Pines. After your lifetime, your estate is able to take a charitable deduction for the full amount of your gift, however large.

Directing Your Gift

Contributions to Tall Pines support land preservation in a variety of ways. You may target your charitable giving by designating its placement in one or both of the following funds.

Land Conservation Partnership Fund

Gifts given to our Land Conservation Partnership Fund are used to preserve land now. They are used for current land acquisition opportunities, general growth and organizational necessities that increase our effectiveness as a Land Trust. This fund is used at the discretion of the Board and staff to further our land protection priorities, or you may designate a particular project in which you'd like your gift used.



“Tall Pines is the leader in keeping some country in Lake Country. We are proud to partner with Tall Pines to protect farmland and open space in Oconomowoc – it keeps us as farmers viable, protects the environment, and keeps the community both beautiful and bountiful.”

—John Koepke

Forever Fund

Another way to support the work of Tall Pines is to give to the Forever Fund. When Tall Pines enters into a conservation easement agreement or takes ownership of a property, a relationship begins which extends into perpetuity. As stewards of the land, the Tall Pines promises to monitor and manage the property and to accept any incurred costs. The Forever Fund was created to help meet these costs to maintain our lands forever. In addition, it provides for the long-term financial stability of the organization. The Forever Fund gives assurance that the Land Trust is prepared and able to meet its obligations long into the future. The Forever Fund is invested and managed by the Board of Directors.

...Lasts Forever.

Clean Water & Air

Designation Language

To make a gift to Tall Pines, ask your attorney to insert the following language into your will or trust:

“I, (name), of (city and state), give to Tall Pines Conservancy Inc., with its principal business office at P.O. Box 65, Nashotah, Wisconsin 53058 (insert written amount of gift, percentage of the estate or residuary of estate, or description of property) for its Land Conservation Partnership Fund—or—Forever Fund.”

If you include, or have already included Tall Pines Conservancy in your estate planning, please let us know. We would like to thank you for your generosity and welcome you to the Stewardship Society. The Stewardship Society is a group of forward thinking individuals who have demonstrated their love of and concern for the future environmental health of our area by supporting Tall Pines Conservancy with their generous donations and planned gifts.

It all Begins with...

The Land... the First School



University Lake School students visit North Lake to learn about stream protection measures to enhance water quality.

The Land... the First Sanctuary



The Land... the First Amphitheater



Enjoying wildlife and recreational activities depends on land. Wildlife maintains the ecological ‘balance of nature’ and our food supply and nature cycles.

Beautiful trees paint a fall palette and create a quiet sanctuary at Camp/Quad, land protected by Tall Pines Conservancy.

...the Land.

Other Ways to Give

When considering a gift, whether it's \$5,000, \$50,000, or even more, the following are ways you can further the mission of the Tall Pines Conservancy now.

1. Outright Gifts

An outright gift is one made while you are living and is transferred directly from you to Tall Pines. Outright gifts provide you with a charitable tax deduction, remove assets from your taxable estate, and have an immediate impact on land preservation efforts.



2. Gifts of Cash

Most gifts of "cash" are in the form of checks. You may also make outright gifts by credit card. If you itemize deductions, these donations are generally deductible up to 50% of your adjusted gross income.

3. Gifts of Stock or Mutual Funds

Giving a gift of stock that you have owned for more than a year can be especially tax-wise. If you were to sell the stock, you would pay a capital gains tax on its increase in value. By making a gift of the stock to Tall Pines, you avoid tax on the gain. In addition, your charitable contribution deduction is equal to the full market value of the stock.

Example: If you purchased stock years ago for \$5,000 and it is now worth \$15,000, an outright gift to Tall Pines would result in a charitable contribution deduction of \$15,000. Also, you would pay no capital gains tax on the \$10,000 appreciated value.

Making a gift of stock and/or mutual funds is easy...

Notify your stockbroker in writing that you are making a charitable donation of stock and/or mutual funds to Tall Pines on a specific date. Ask your broker to notify Tall Pines of the gift. Upon notice that title to the stock/mutual fund has been transferred to Tall Pines, we will ask the broker to sell the stock/mutual fund or transfer it to our brokerage account. Tall Pines will pay the commission and the donor avoids capital gains tax.

4. Other Non-Cash Assets

Tall Pines Conservancy also accepts gifts such as real estate, stock options, retirement plans and tangible personal property.



5. Life Insurance Gifts

One simple way to leave a gift to Tall Pines is to donate a life insurance policy to us or simply name us as the beneficiary. If the gift is a paid-up policy, you will receive an income tax deduction equal to the lesser of the cash value of the policy or the total premiums paid. To qualify for the federal charitable contribution deduction on the gift of an existing policy, you must name us as the owner and beneficiary and can do so by simply contacting your insurance agent.

6. Charitable Remainder Trust

A charitable remainder trust is one of several legal and financial tools that may be helpful in combining estate planning and charitable giving. A charitable income tax deduction may be available. Individuals may make donations to their favorite charities, such as Tall Pines, and maintain an income stream from their asset(s).

The Next Step

If you'd like assistance planning and directing your gift to Tall Pines, please contact:

Tall Pines Conservancy
P.O. Box 65
Nashotah, WI 53058
(262) 369-0500
susanb@tallpinesconservancy.org



Thank You...

In whatever manner you choose to give and in whatever amount, we are grateful for your investment in our future. Your planning today helps ensure the ecological well-being and natural beauty of our area tomorrow. Future generations will benefit from your foresight. ***You truly have given a gift that lasts forever.***

The information in this brochure is not intended as legal advice. Please consult with your attorney or tax advisor when making your giving arrangements. All examples used within are for illustrative purposes only and are based on IRS regulations in effect at the time of printing.

Our Mission...

The mission of Tall Pines Conservancy is to preserve our rural heritage by protecting remaining farmland, water resources and natural areas and open spaces impacting Northwestern Waukesha County.

Currently, Tall Pines has protected approximately 1000 acres of land by conservation easements and fee acquisition.



P.O. Box 65, Nashotah, WI 53058

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WWW.TALLPINESCONSERVANCY.ORG

Tall Pines Conservancy is a 501 (c) (3) tax exempt organization