

Legacy



Circle

Preserving life and protecting land
with a legacy that lives forever



Boo's Bluff Natural Area photo by Dan Eggert



Door County Land Trust

Protecting Door County's Exceptional Lands and Waters...Forever

A Forever Tribute



“It’s said that nothing lasts forever, but land is perhaps the closest thing to an exception. It’s a great comfort to us that our planned gift...will provide future generations with the joys, comfort, and wonder that we’ve been privileged to enjoy.”

- John Van Den Brandt

Little Lake Nature Preserve photo by Jim Perry

We have an obligation to future generations to identify, protect, and care for the special places that make Door County one of the most inspiring places to live and visit. Consider the difference you can make in our planet’s future and how your generosity will be remembered, when you plan for a legacy that lives on forever in wild, irreplaceable, protected lands.

Let’s meet this challenge together! By including Door County Land Trust in your will or estate plan, you will be welcomed into the Legacy Circle. Members of the Legacy Circle plan to give charitable gifts to protect Door County’s beauty and ecology.

Making a charitable donation that lives on forever is easier than you might imagine. Not only is it easy, but there are many choices of how to provide a Legacy Circle gift to Door County Land Trust. Consider these options: a bequest provision of cash, a gift of real estate, a designation of a retirement plan or IRA, an insurance beneficiary designation, or a charitable remainder trust.

Ask us how. No matter the size of your gift, we can help you create your legacy. Call us to begin discussing how you can leave a legacy of protected lands.

Your gift is forever. Door County Land Trust has set in place an organizational foundation for perpetuity. Door County Land Trust is accredited by the Land Trust Accreditation Commission. The seal of accreditation confirms Door County Land Trust operations meet and exceed the national Land Trust Alliance Accreditation Commission’s standards of sound finances, ethical conduct, responsible governance, and lasting stewardship.

A Legacy Written IN THE Stars



Vonnie and Dave Callsen

A love for the outdoors guided Vonnie and Dave Callsen to put down stakes permanently in Ellison Bay over 35 years ago. But for Dave, the urge to surround himself with nature has been a lifelong pursuit, beginning as a boy living in Madison.

“I grew up with friends who liked to go out in the country,” he says. “When we were in grade school we’d camp out all by ourselves. No tents, we’d just lay down on blankets and sleep on the side of a hill.” Vonnie adds, “Under the stars.”

After their marriage and a move to the Chicago suburbs for Dave’s management position at AT&T, the pull to live in Door County made itself known during family camping trips when their three children were young. “Our favorite place to camp was on the peninsula,” Vonnie said. “It was then we pretty much decided we would move up here.”

The couple built the family-run grocery, Main Street Market, in Egg Harbor in 1987. They value their home’s rural setting on 25 acres as an antidote to the busy store.



Bjorklunden conservation easement photo by Dan Eggert

“I like it here because of the wildlife and it’s peaceful,” Dave said. “The night skies are gorgeous here. You have a clear night in the winter or the summer, it doesn’t matter, it’s just great.”

The couple’s understanding of the value of wild places has grown from living in Door County and from their involvement with the Door County Land Trust. Dave served on the board for a number of years, holding many offices including Board President. “It was fascinating when I got on the board because I learned so much more,” Dave says.

A lifestyle that includes the benefits of nature is something the Callsens have promoted with their children, grandchildren, and now great-grandchildren, many of whom live on the peninsula. It is also something they feel is important to protect for future generations overall. Vonnie and Dave have shown their commitment by becoming members of the Land Trust’s Legacy Circle.

“If you’re going to leave something for those you leave behind, we always felt that what we do should be something that would be lasting,” Dave says. “If you want to leave a truly lasting presence, the Legacy Circle is a great place to do it because it’s forever. Once you get involved with it, whatever properties you’re talking about... it goes on generation after generation.”

A Love of Place Comes Full Circle

By Beth Coleman and Curt Wessel

Our wedding invitation borrowed lines from the Wendell Berry poem, *Song*, “Within the circles of our lives we dance the circles of the year, the circles of the seasons within the circles of the years...”

We moved to this county as young adults, drawn to the water and landscapes we loved. So it felt right to settle in, creating a home, relationships, and our custom woodworking and garden design businesses that shaped our circles throughout the years. Twenty-five years later, we quoted those lines again as we gathered to celebrate our life and marriage lived within circles of friends and neighbors, and the seasons of our Door County community.

When we started to plan our 25-year anniversary gathering, we also knew it was time to do our estate planning. We’ve always tried to be good stewards of our resources, and we’ve certainly taken to heart the advice of our friend Michael, a sustainable investments advisor, who reminded us that, “Money alone can’t secure your future...it also requires investing in your community, your skill sets, your friendships, and the environment.”*

Our lifestyle, volunteering, and giving whatever financial gifts we could afford to local organizations have certainly affirmed that concept. And over the years as we became more versed in local land and water conservation efforts, supporting Door County Land Trust and its mission to preserve and protect Door County’s land and waters was a natural fit.

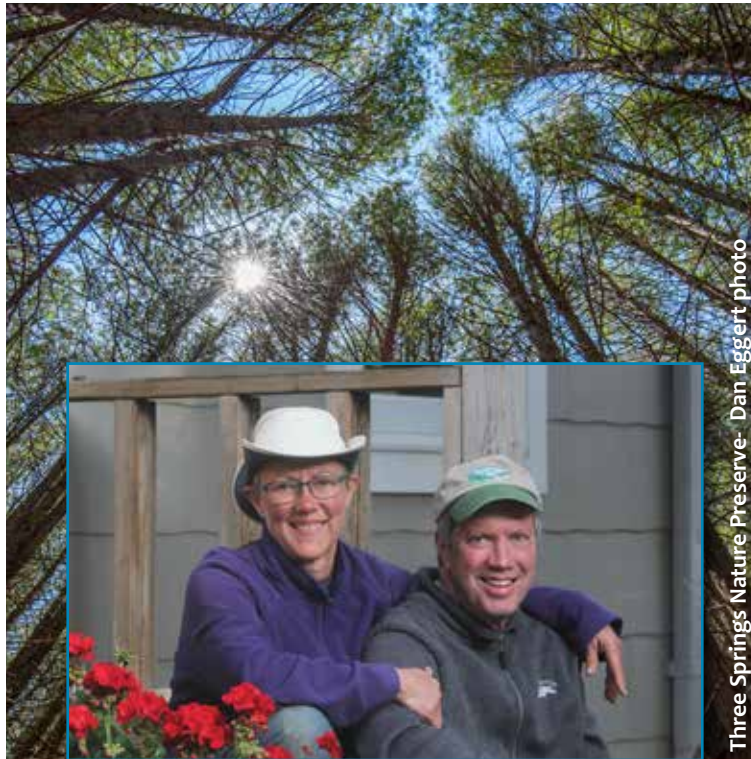
We became members in 2003, and since that time have seen environmental issues, development pressure, and the land protection process only grow in complexity. And through volunteering, we have appreciated getting to know staff, and have been impressed by their expertise, dedication and focus in bringing the Land Trust’s mission to life. Also,

through Beth’s five years of serving as a Land Trust board member and Chair of the Membership Committee, we’ve seen first-hand the diverse skills and commitment the board, committee leaders, members, and volunteers also bring to this organization. We’ve come to trust that the Land Trust is a thoughtful steward of resources, and that it holds the well-being of Door County communities—both environmental and human—as a core value. So as we

considered a planned gift for this place we love, the Land Trust was a fitting recipient.

We joked with our lawyer that we’re not uber-rich, but we have certainly experienced blessedness; and since we don’t have children as a legacy, we consider this part of our estate as a way of paying forward for Door County’s future. **It matters to us that the Land Trust is nurturing the next generation of conservationists by fostering their connections to the land and waters that the Land Trust protects. We trust our gift will help sustain this challenging task of protecting land and water in perpetuity.**

*Hal Brill, Michael Kramer, Christopher Peck, *The Resilient Investor: A Plan for Your Life, Not Just Your Money* (Oakland: Berrett-Koehler Publishers, 2015).



Beth Coleman and Curt Wessel

Three Springs Nature Preserve - Dan Eggert photo

Ways to Give

Your Legacy Gift will leave a lasting impact beyond your lifetime.

With so many giving options, please consult with your attorney or tax advisor about the various tax benefits and issues that apply to your personal situation. We are available to help facilitate these discussions and answer any questions you may have.

Bequest Provision of Cash

An outright gift of cash is the simplest way to give. When bequeathing cash, decide how much you wish to donate and have your attorney include your bequest to the Door County Land Trust in your will or trust.

Retirement Plan Beneficiary

- List DCLT as a beneficiary of your account
- Make DCLT a contingent beneficiary
- Give from your IRA

Leave a percentage or the entire amount of your retirement account to the Land Trust. By naming the Land Trust as the beneficiary, you avoid estate and income taxes on all amounts passing to the Land Trust. In many cases, a beneficiary of a retirement account would receive less than forty percent of the amount after tax, while the Land Trust would receive the entire amount.

Charitable Gift Annuity

Create a charitable gift annuity, which allows you to receive income during your lifetime, with the remainder benefiting the Land Trust.

Life Insurance Beneficiary Designation

A gift of life insurance has many advantages. This option is cost efficient, has tax benefits, and it's secure and confidential. You may give the entirety of an existing policy, retain ownership of an existing policy and name DCLT as a beneficiary, or purchase a new policy for future charitable gifts.

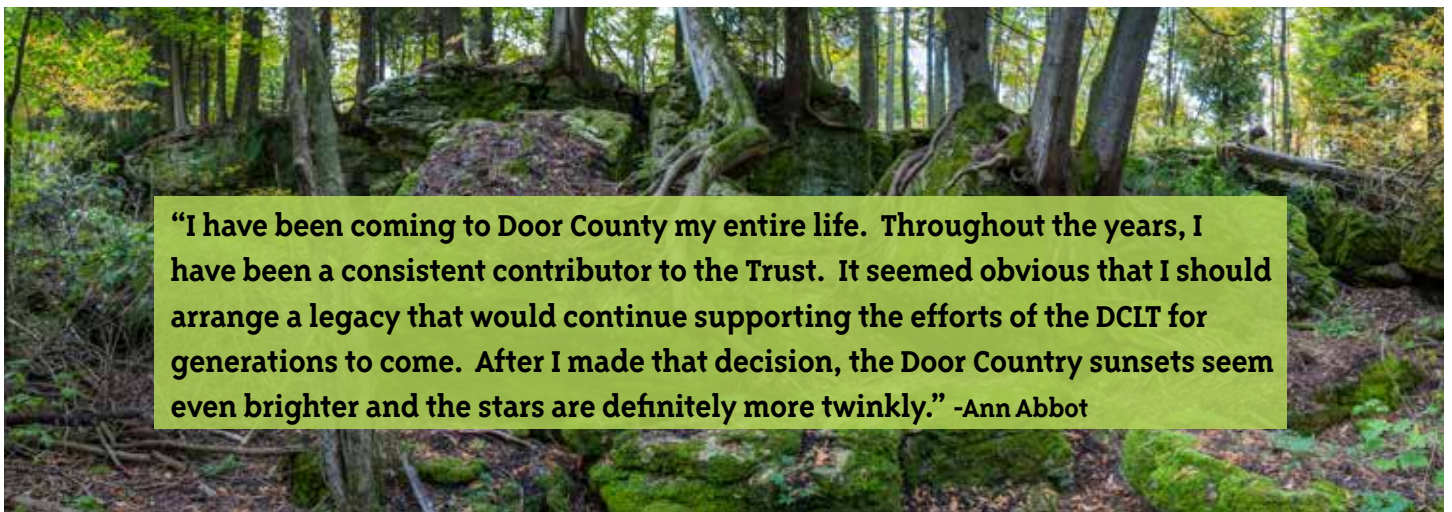
Gift of Real Estate

Giving through real estate offers incredible flexibility, as the following demonstrate:

- A direct gift of property through your will or living trust
- Donate your home but continue to live there
- Fund a charitable gift annuity with property
- Make a bargain sale of land
- Fund a FLIP Charitable Remainder Trust (Lifetime payments are sent to you or another named recipient after the property is sold. After death, DCLT receives the balance of the trust.)
- Establish a memorial or endowment gift

Charitable Trust

There are typically two types of trusts—a **Charitable Remainder Trust** and a **Charitable Lead Trust**. With the Charitable Remainder Trust, DCLT receives the remaining assets after your lifetime or term of years. The Charitable Lead Trust distributes the designated gift to DCLT first, with the remainder going to individuals of your choosing.



“I have been coming to Door County my entire life. Throughout the years, I have been a consistent contributor to the Trust. It seemed obvious that I should arrange a legacy that would continue supporting the efforts of the DCLT for generations to come. After I made that decision, the Door Country sunsets seem even brighter and the stars are definitely more twinkly.” -Ann Abbot

Directing Your Gift

You may designate how your gift is to be used by the Land Trust by directing your gift to any of the following options:

Option 1. Unrestricted

Unrestricted gifts will provide the Door County Land Trust's Board of Directors with the flexibility to use the funds to meet the Land Trust's highest needs, including land acquisition expenses not covered by grants, land maintenance costs, unanticipated operating expenses, special project costs, or any combination of these costs. The Board of Directors also may designate all or a portion of such gifts to the Land Trust's Stewardship Endowment Fund.

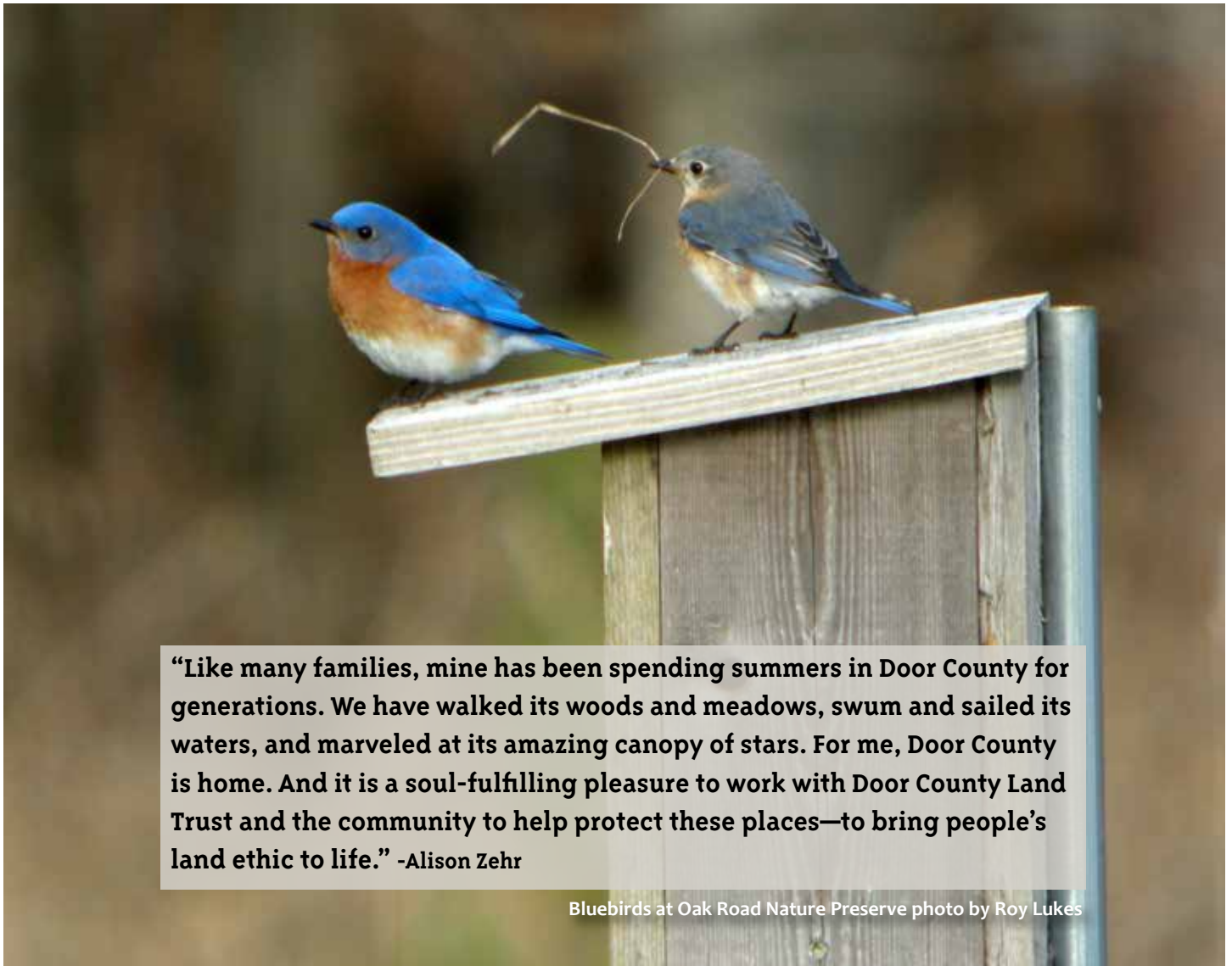
Option 2. Stewardship Endowment Fund

You may direct your gift to the Stewardship Endowment Fund. All gifts to the Stewardship

Endowment Fund will be held in perpetuity and will be available to fulfill the obligation of caring for Land Trust lands long into the future. Your gift directed to this fund will be invested and managed by the Door County Land Trust Endowment Board of Trustees. This Fund is structured to pay its annual income to the Land Trust to enable it to care for its lands, while at the same time growing principle through a conservative, professional investment strategy.

Option 3. Land Acquisition Fund

This special fund provides the Land Trust with a ready source of dollars to respond to immediate opportunities to purchase and protect properties of high ecological and scenic value.



“Like many families, mine has been spending summers in Door County for generations. We have walked its woods and meadows, swum and sailed its waters, and marveled at its amazing canopy of stars. For me, Door County is home. And it is a soul-fulfilling pleasure to work with Door County Land Trust and the community to help protect these places—to bring people’s land ethic to life.” -Alison Zehr

It is my/our intent to leave a legacy to Door County Land Trust, Inc. through my/our:

- | | |
|---|---|
| <input type="checkbox"/> Will | <input type="checkbox"/> Living Trust |
| <input type="checkbox"/> Retirement Plan Assets | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Donor-advised Fund |
| <input type="checkbox"/> Securities and/or appreciated assets | <input type="checkbox"/> Other: _____ |

I/we wish to inform the Door County Land Trust, Inc., for long-term planning purposes only, that as of this date, the value of my/our gift is: \$ _____.* (If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.) I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. (The Door County Land Trust, Inc. kindly requests notification any time you make changes or adjustments to your gift.)

Gift Intention

Please welcome me/us into the Door County Land Trust membership under the following conditions:

- Feel free to publish my/our name(s) among your lists of DCLT members as a motivation for others to leave a future gift to benefit the DCLT. I/we wish my/our name(s) to appear as:

- I/We prefer our gift to remain Anonymous

Other information you would like to share with us (e.g., any contingency provisions related to the gift, contact information of your estate planning advisor, etc.): _____

Please list my name for recognition purposes as follows:

We recognize that your circumstances and the estimated gift values you provide can change over time and we appreciate details of your arrangements to help us ensure that your wishes are followed. We would welcome for our confidential records a copy of your Will or Trust or the appropriate section(s) thereof in order to assure our continued ability to fulfill your intentions. Thank you.

Thank you for leaving a legacy for future generations to enjoy Door County's
exceptional lands and waters . . . forever.

Mail to:
Door County Land Trust
Planned Giving
PO Box 65
Sturgeon Bay, WI 53245



Door County Land Trust

Sample Bequest Language to Include in Your Will or Estate Plan

Once you choose to include a provision for the Door County Land Trust in your will or estate plan, you have many options for how to do so. A bequest is a personal decision, a statement incorporated into your will that you wish to have a certain portion of your assets given to the Door County Land Trust in your name. Properly constructed, a bequest can represent a considerable estate tax savings for your heirs and provide a legacy gift to Door County Land Trust. Several options are described here, though we encourage you to seek advice from your attorney or tax advisor regarding your unique situation and the latest guidance on taxes and estate laws.

Fixed-Sum Bequest: *A certain number of dollars, or shares of stock, or a parcel of real property is to be transferred. The bequest in your will might read:*

I give the sum of \$ _____ to the Door County Land Trust, Inc., a non-profit corporation organized under the laws of the State of Wisconsin, with a principal business address of P.O. Box 65 (217 N. 4th Ave., 2nd Floor), Sturgeon Bay, WI 54235, or its successor(s) in interest.

Fixed-Percentage Bequest: *Sometimes we are reluctant to name a specific dollar amount for a planned gift because we do not know what our family will need or what our resources might be in years to come. This type of bequest would state:*

I give _____% of my gross estate to the Door County Land Trust, Inc., a non-profit corporation organized under the laws of the State of Wisconsin, with a principal business address of P.O. Box 65 (217 N. 4th Ave., 2nd Floor), Sturgeon Bay, WI 54235, or its successor(s) in interest.

Residual Bequests: *Sometimes we want to make specific provisions for individuals but then leave the remainder of our estate to charity. After naming the specific individuals and the amounts they are to receive, a residual bequest would read:*

I give all the rest, residue, and remainder of my estate to the Door County Land Trust, Inc., a non-profit corporation organized under the laws of the State of Wisconsin, with a principal business address of P.O. Box 65 (217 N. 4th Ave., 2nd Floor), Sturgeon Bay, WI 54235, or its successor(s) in interest.

Event-Triggered Bequests: *Even with the best estate plan, you may find yourself in an unanticipated situation in which your named beneficiary might predecease you. It is possible to create a contingent bequest in which you would state:*

If _____ (the named beneficiary) does not survive me, I give such share to the Door County Land Trust, Inc., a non-profit corporation organized under the laws of the State of Wisconsin, with a principal business address of P.O. Box 65 (217 N. 4th Ave., 2nd Floor), Sturgeon Bay, WI 54235, or its successor(s) in interest.

Making a planned gift to the Door County Land Trust can be an important part of your estate strategy. Please consult with your attorney or tax advisor about the various tax benefits and issues that apply to your personal situation. To discuss planning a charitable bequest or to receive assistance in drafting language, please contact Director of Charitable Giving Cinnamon Rossman at (920)746-1027.

The Door County Land Trust is designated by the Internal Revenue Service as a 501(c)(3) non-profit charitable organization to which tax deductible contributions may be made. Their federal tax ID is 39-1561423.

Consulting AN Attorney

Bequest language may vary from state to state, so it is advisable to use an attorney who understands local estate laws. With that in mind, we suggest that you provide the following information to your attorney:

The information in this booklet is not intended as legal advice. All examples used within are for illustrative purposes only and are based on IRS regulations in effect at the time of this printing (2023). Please consult with your financial planner, tax advisor, or attorney when making your giving arrangements to the Door County Land Trust.

Official name: Door County Land Trust, Inc.

Federal ID: 39-1561423

**Principal place of business: P.O. Box 65 (217 N.4th Avenue)
Sturgeon Bay, Wisconsin 54235**

Please call or visit us if you have any questions about estate planning and the Door County Land Trust. We welcome a conversation about the use of your gift to help the Land Trust protect Door County's exceptional lands and waters forever.

CONTACT:

Cinnamon Rossman, Director of Charitable Giving

Phone: (920)746-1359

Email: giving@doorcountylandtrust.org

Website: www.DoorCountyLandTrust.org



"I'm a professional wildlife photographer. Along with my wife, Jean, the pursuit of wildlife takes us to some of the world's most beautiful and diverse environments. Yet, when asked to name our favorite spot on the planet, we are quick to reply "Door County." It's a great comfort to us that our planned gift through the Legacy Circle will help ensure that these places will remain forever wild." - John Van Den Brandt

Fox and Kits photo John Van Den Brandt



Door County Land Trust

Protecting Door County's Exceptional Lands and Waters...Forever

(920) 746-1359 • www.DoorCountyLandTrust.org

PO Box 65, Sturgeon Bay, WI 54235




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- Sound Finances
 - Ethical Conduct
 - Responsible Governance
 - Lasting Stewardship
-



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- Dave Callsen