

A Legacy That Lives On

Protecting the Tongass for generations to come through the Living Wilderness Fund

Sixty years ago, a small group of Sitkans fought hard to leave a legacy of protected Wilderness in Southeast Alaska. The Living Wilderness Fund honors those who have cared for the Tongass while ensuring enduring stewardship, advocacy, and care so that future generations can experience the wilderness areas we cherish. By including a legacy gift in your will, you help safeguard the lands, waters, and ways of life that define this place—and carry the voice of the Wilderness forward.



THE
LIVING
WILDERNESS
FUND

“I have found the most beautiful, most enriching, most exhilarating experiences of my life in the wild country of Southeast Alaska. For this I feel immensely privileged. The Living Wilderness Fund is my investment in a dream: that children born a century from now will have the same privilege to experience these places, surrounded by the same silence and blessed by the same abiding peace.

– Richard Nelson, LWF Donor

A gift to the endowment is designed to last forever. Your gift is carefully invested, and only a portion of the earnings are used each year—allowing your support to grow and provide funding not just today, but for generations to come. Your gift will help sustain the Living Wilderness Program and Wilderness advocacy at Sitka Conservation Society year after year. Your legacy will inspire new generations of advocates and voices for the Tongass – ensuring there will always be people who love, defend, and protect these wild places.

Below, you will find information that will help with your planning.

What is legacy giving? A legacy gift is given after the donor’s lifetime, through their will or estate plan. Legacy gifts often allow you to give more generously than you might be able to during your lifetime. Such gifts greatly impact wilderness advocacy by extending it far into the future.

Everyone can make a legacy gift. Anyone of any age or means can make a legacy gift. You do not need to be wealthy, it doesn’t cost you anything, and you can change your mind at any time by changing your will.

If you already have a will, giving a legacy gift is easy. You can prepare a short document known as a “codicil,” sign and date it in the presence of two witnesses who will not benefit from the change, and attach it to your will. (See the sample codicil on the back page.)

Legacy gifts are important sources of long-term support for wilderness. Legacy gifts are often the easiest way to make a significant contribution to the Living Wilderness Fund. The sample bequest language below can help you and your advisors include a wilderness legacy in your will.

Sample Bequest Language

I hereby give to the Sitka Conservation Society, an Alaska charitable corporation, EIN: 92-0096633, (hereinafter referred to as SCS), the following: the sum of \$___ OR ___ percent (___%) of my estate OR ___ percent (___%) of the residue of my estate. SCS shall use this gift for support of the Living Wilderness Fund.

Leave a gift of stock or securities. Gifts of stock or securities are a great way to make a tax deductible gift to the Living Wilderness Fund. There are potential tax benefits if you contribute appreciated securities that you have held for one year or more.

Make a gift of real estate. You can give your personal residence to the Living Wilderness Fund and still maintain lifetime use of the property, while benefiting from income and capital gains tax advantages.

Leaving all of part of a retirement plan or IRA. Naming the Living Wilderness Fund as a full or partial beneficiary of your pension, 401K, IRA, or other retirement plan can be the easiest and most effective planned gift you can make. Simply notify your plan's administrator of your wish to change the beneficiary. A change of beneficiary form will be required.

Give through your Donor Advised Fund (DAF). It's easy to designate the Living Wilderness Fund as a beneficiary in your DAF account. You can often do this online, or contact your DAF Sponsor.

A gift through your life insurance policy is also possible. You can name the Living Wilderness Fund as the primary, partial, or alternate beneficiary of your life insurance policy by filling out a change of beneficiary form with your insurance company. Furthermore, if you and your family no longer need the policy proceeds in your estate, you can transfer ownership of the policy to the Living Wilderness Fund.

Other options for giving. In addition to the options above, there are many other possibilities that may better suit you and your family. Ask your financial advisor about these and other ways to give, including charitable gift annuities, charitable lead trusts, and charitable remainder trusts.

Be sure to consult an estate planning professional or tax attorney. It is important to receive independent advice from professionals whom you know and trust. Please consult with your trusted professionals to determine which way of contributing a legacy suits you best.

Your will is your legacy. If you choose to include the Living Wilderness Fund in your estate plans and are comfortable doing so, please let us know your intentions so we may thank you and acknowledge your generous gift.

For additional information and assistance, please contact:

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Sample Codicil

[date]

I, [name], a resident of the County of [county], declare that this is the codicil to my last will and testament, which is dated [date original will signed].

I add or change said last will in the following manner:

*[List all changes or additions to the original will. Reference each section number of the will and the specific language affected. **Here is where you could include a bequest to the Living Wilderness Fund.** See Sample Bequest Language on the previous page.]*

Otherwise, I hereby confirm and republish my will, dated [date original will signed], in all other respects other than those herein mentioned.

I subscribe my name to this codicil this [day, e.g. 1st] day of [month], [year] at [full address where signed], in the presence of [full name of first witness to codicil], and [full name of second witness to codicil], attesting witnesses, who subscribe their names here in my presence.

_____[your signature here]_____, Maker

ATTEST

On the date last above written, [name], known to us to be the person whose signature appears at the end of the codicil, declared to us, [full name of first witness to codicil], and [full name of second witness to codicil], the undersigned, that the foregoing instrument, consisting of [number of pages to codicil] page(s), was the codicil to the will, dated [date original will signed]; who then signed the codicil in our presence, and now in the presence of each other, we now sign our names as witnesses.

[Names, signatures, addresses, and date signed of two witnesses.]