

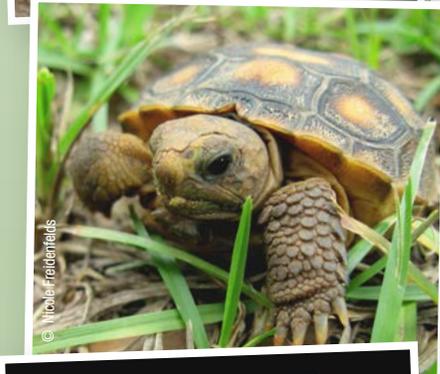


THE TRACKS YOU LEAVE BEHIND

LEGACY AND FINANCIAL PLANNING
NEWS FOR FRIENDS OF DEFENDERS

Spotlight on the Southeast

Defenders of Wildlife has expanded into the Southeast with our newest field office in Asheville, North Carolina, and we sat down with Program Director Ben Prater to discuss the region.



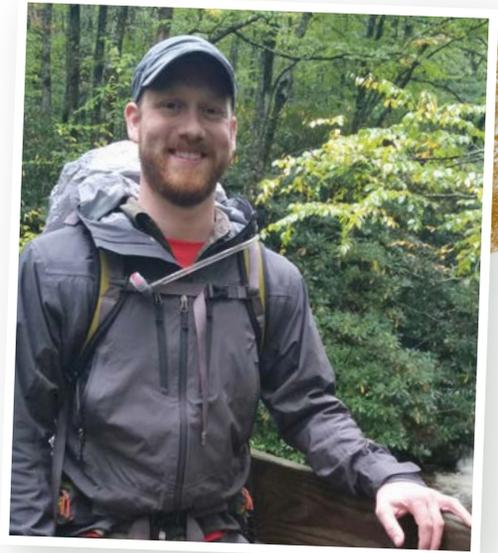
Q: The American Southeast is a vibrant and biodiverse region. What are the areas and species of focus for your team?

A: Defenders' work in the Southeast focuses on four landscapes: the Greater Everglades, the Carolina Coast, the Florida Panhandle and the Southern Appalachians.

The Southeast is home to an abundance of threatened species—13 of the countless imperiled species Defenders fights to protect! Of this group, our work currently concentrates on what I like to call the “Big Four”: the Florida panther, gopher tortoise, red wolf and my personal favorite—the eastern hellbender, the largest salamander in North America (pictured left.)

Q: What are the major conservation issues facing the Southeast?

A: Rapid development and human expansion into critical habitats is the chief threat to conservation in the Southeast. The Florida panther is facing all-time high mortality rates from vehicle collisions as a result of road development. Increased development has led



to water quality degradation in salamander territory and loss of gopher tortoise habitat. Red wolves are also threatened by habitat loss from rising sea levels but, more directly from shooting deaths when they are mistaken for coyotes by hunters.

Q: How is Defenders of Wildlife using innovative methods to combat these threats?

A: We have created a comprehensive conservation plan for the Southeast using mapping technology. To determine the species and locations

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FOR ADDITIONAL INFORMATION, PLEASE CONTACT:

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SHELTER A REAL ESTATE SALE FROM CAPITAL GAINS TAX AND RECEIVE INCOME FOR LIFE

Are you thinking about selling a piece of real estate this spring? If so, consider donating your property to a charitable remainder unitrust (“CRUT”) for Defenders of Wildlife. This can provide lifetime income and tax benefits to you while helping to protect the wildlife you love.

What is a CRUT?

A CRUT is a tax-exempt trust that can sell your property without paying immediate capital gains tax. So the entire sale proceeds (net of closing costs and real estate commission) can be put to work for you. You (and/or others you designate) would receive lifetime income from your CRUT. The remaining principal would then be distributed to Defenders or divided among Defenders and other charities.

Types of Properties That Can Be Donated

Many types of unencumbered properties can be donated to a CRUT. These include a personal residence or vacation home, a residential rental property such as a duplex or apartment building, a commercial property such as an office building or warehouse or a vacant lot. Suggested minimum value is \$100,000.

Tax Benefits

Since up front capital gains tax and net investment income tax are avoided when the property that you have donated is sold, considerably more money will be available from the sale proceeds to reinvest for your benefit. This can make a significant difference with today’s high capital gains tax rates. Plus, you will get an immediate income tax deduction when you create your CRUT.

Income You Will Receive

When setting up a CRUT, you choose the

percentage payout. Each year after the sale of the property you donate, the CRUT’s value is assessed and you will receive your chosen percentage payout based on the annual assessment. So if your CRUT grows over time, your income will increase too.

Example:

Carol, age 70, bought a vacant lot many years ago, dreaming about building a retirement home. The lot originally cost \$125,000 and is now worth \$300,000. Since she is no longer interested in developing the property, she decides to donate it to a CRUT for Defenders. The property is sold by the CRUT tax-free, saving \$41,650 in immediate capital gains tax and net investment income tax. The sale proceeds are reinvested for her benefit. Having chosen 6% as her payout, she will receive approximately \$18,000/year from her CRUT. Plus, she gets an immediate income tax deduction of \$139,785 for her gift.

For more detailed information, please fill out the enclosed reply form to request our packet “*Shelter a Real Estate Sale from Capital Gains Tax: Make a Gift That Will Provide You with Lifetime Income and Tax Savings while Protecting the Wildlife You Love.*”



© Jon La Vasseur — Greater Sage-Grouse

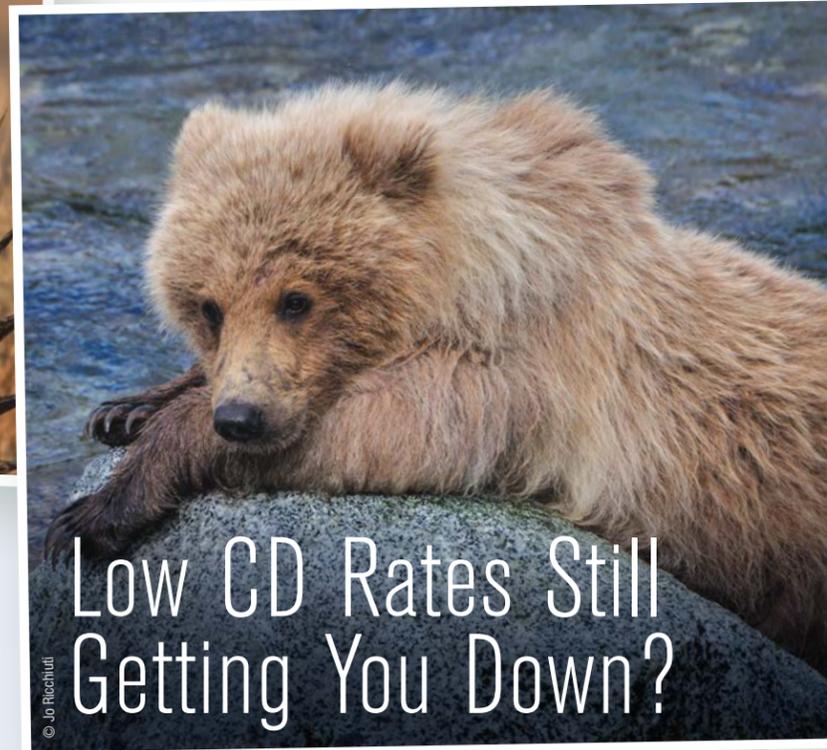


IF YOU HAVE A DONOR ADVISED FUND

Here’s Some Sage Advice for You

If you have a donor-advised fund, you can make a profound difference in protecting endangered wildlife by recommending annual grants to Defenders of Wildlife. It is also important to consider what will happen to assets remaining in your donor-advised fund when you are no longer there to make recommendations on disposition of funds. Generally there are several options, including appointing advisors to succeed you, creating endowments for annual distributions to specified charities or naming charities as lump sum beneficiaries of remaining funds.

Please consider naming Defenders of Wildlife as a lump sum beneficiary of a portion of assets remaining in your fund after your lifetime. This is the most effective way to ensure that the wildlife you cherish will continue to be protected for years to come. And, this is a smart way to provide for Defenders of Wildlife without rewriting your will or trust. Please consult with your plan provider for paperwork necessary to designate Defenders as a beneficiary. Furthermore, please let us know if you have named Defenders as a beneficiary so we can welcome you into our *Wildlife Legacy Society*.



Low CD Rates Still Getting You Down?

Enhance Your Income and Save Taxes While Protecting Wildlife

If you can’t bear low CD rates anymore, create a Defenders of Wildlife charitable gift annuity. In exchange for your gift of cash or appreciated securities (minimum gift amount \$5,000), you will receive lifetime income.

Age	65	70	75	80	85	90
Rate	4.7%	5.1%	5.8%	6.8%	7.8%	9.0%

Example: *Donate \$25,000 at age 80 and receive \$1,700/year (6.8%) for the rest of your life.*

You will also receive an immediate income tax deduction for a portion of the value of your gift. And part of your annuity will most likely be completely tax-free.

To receive a free personal illustration showing the annuity rate and tax benefits you would receive, please email Jim Luerksen at legacy@defenders.org, visit our website or call 1-800-915-6789.

Your gift will help protect bears, wolves, sea otters and other wildlife for generations to come.

WILDLIFE DEFENDER KAY STONE

Wildlife Legacy Society member Kay Stone has included Defenders of Wildlife in her will, ensuring that someone will speak up for wildlife after she's gone.



“I am proud to support and be a part of an organization that is honorable, honest and dedicated. When I leave this earth, I know my gift will be of benefit to future generations. Thank you, Defenders of Wildlife”

—Kay Stone

Spotlight on the Southeast

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that are most at-risk, Defenders has combined publically available data with analytical tools to rank counties by their level of vulnerability, and the resulting maps help us concentrate our work where it is most crucial. We assist in incentive-based programs that guide land-use planning decisions and promote coexistence in communities using outreach and education efforts. Additionally, we provide nonlethal tools like livestock enclosures and bear-resistant trash containers to local residents.

Q: What can people do to help protect the wildlife and special places of this region?

A: Advocacy is a major way that citizens in the southeastern United States—and across the country—can affect change. The Southeast office is taking legal advocacy to the next level with resources on the ground to work with agencies, landowners and decision makers to protect imperiled wildlife. I encourage Defenders members to attend our local meetings, call their representatives and sign petitions—our elected officials need to hear from us! Supporting Defenders with a gift is also a great way to have a substantial impact on wildlife protection.

Read more about Defenders' work in the Southeast at: www.defenders.org/thesoutheast

Sample bequest language for your attorney:

“I give, devise and bequeath ____% of my estate/the remainder [or \$_____] of my estate to Defenders of Wildlife, a nonprofit 501(c)(3) [Tax ID #53-018381] located in Washington, DC.”

For additional information...



ABOUT REMEMBERING DEFENDERS IN YOUR ESTATE PLANS, CONTACT US:

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We recommend you seek the advice of an estate or tax professional in connection with any planned gift.