

OZARKS FOREVER!

Dear Friends:

Why are we here together, as partners in conservation? It's because we have a common goal of ensuring that the Ozarks remain an extraordinary landscape, a unique blend of natural resources, working lands, recreation and a place we call our home.

We all participate in different ways to accomplish this goal. Our partner landowners choose to protect their properties with perpetual conservation easements. Board and staff of OLT devote our time and energy to work in tandem with those landowners, and to reach out to others who share those goals.

And this issue of the Holler is devoted to another way that we can collaborate. Some of our supporters devote a portion of their own resources, through their trusts and estates, to long-term commitment of financial resources to help OLT ensure it can be around for generations to come, both for our current landowner partners and the new ones that we hope to meet.

As Jack Witte says in his cover article, there are ways to become comfortable with an organization to the extent that you entrust precious estate resources to its success. And as our Board member and family landowner Harvard Muhm points out, the goal is to match your giving objectives with a plan that satisfies both personal and financial goals.

These aren't matters to be decided overnight by anyone, no matter how committed you are to conservation and the Ozarks. But if you want to chat about it, we're always here to talk it over, think it through and make a plan. Our mission first and foremost is to protect and conserve the beauty and natural resources of the Ozarks. If your financial and personal goals mesh with ours, let's have a conversation! Feel free to reach out anytime. Email me at larry.levin@ozarklandtrust.org , or call us at 573-817-2020.

Thanks again for your commitment to the Ozarks and conservation.

Sincerely,
Larry Levin
Executive Director

Muhm-cont from page 5

If you want to create a legacy gift in your trust or estate, you should consult your attorney about the options. Your attorney should walk you through various ways to give money, depending on your philanthropic goals, your current needs, your assets (including highly appreciated ones), and your life expectancy. Gifts can be included in wills and trusts to take effect upon your death, but they also can be accomplished by using special charitable trust vehicles or charitable gift annuities – and also using life insurance as a means of funding gifts. Donors need not lose the ability to enjoy income during their lifetimes to be able to create a legacy of their interest in preserving our environment.

Over the past quarter century of my law practice, I have not encountered a client that has expressed regret at his or her philanthropic efforts; instead, my experience is that legacy giving is not only rewarding but comprises a meaningful and lasting way to reflect a family's values. So if protecting our exquisite and unique Ozark resources is part of your family's philanthropic mission, have a conversation with OLT staff. They can help you brainstorm the best way to create a lasting conservation legacy, and support the goal of ensuring OLT will be here to steward and protect Ozark lands for generations to come.

Harvard Muhm, a member of the Ozark Land Trust Board, is the chair of the Trusts & Estates Department of Capes Sokol Goodman & Sarachan, P.C. in St. Louis, Missouri. He assists clients with estate planning and real estate transactions, including philanthropic planning and execution. Harvard has assisted clients (and his own family) with planning their legacies, which many times includes land and environmental conservation.

Harvard has served in leadership positions with a number of charitable organizations. He brings to the board his legal training and his experience working with landowners and conservation efforts. Harvard believes in taking steps now to preserve natural habitat for flora and fauna.

THE OZARK HOLLER

OZARK LAND TRUST NEWSLETTER • Fall 2020

Since 1984, Ozark Land Trust has partnered with landowners wishing to leave a legacy of their beautiful resources for future generations. But some donors also choose to create a different kind of legacy, through their estate and trust planning. Our supporter Jack Witte explains why he made this choice and our Board member and estate attorney Harvard Muhm offers his insights on creating such a legacy from a personal and professional perspective.

Why I'm Leaving a Legacy to OLT

By Jack Witte

When I'm at Panera or St. Louis' famous Ted Drewes' frozen custard stand, it can be hard for me to decide what sandwich to order or custard to get. So, the task of selecting a nonprofit for a planned estate gift might sound really difficult. The difference, though, is that I've been "waiting in line" at the Ozark Land Trust "counter" for over 20 years.

During that time, my wife Barb and I have taken our two sons on many outdoor trips. Many of the parks and forests we visited were made possible by private land donations and conservation efforts, so it has always seemed only natural to pay it forward. Yet with so many organizations to choose from, how do you narrow it down and perform some type of due diligence?

It would be easy to pick a large organization and just assume that public scrutiny and audited financial statements are enough. As recent investigations of several national nonprofits illustrate, though, many supporters of those groups might tell you not to bet on it.

My preference is to support local organizations than larger national ones. One of a scale such that I can meet and get to know the management team as well as become actively involved on committees.



Only after I became a member of OLT's finance committee did I choose to make a legacy gift to the organization. I was able to see that OLT not only helps to protect many square miles of Ozark lands each year, but they do it on a lean operating budget, with a lot

of volunteer time, and a significant financial contribution from most conservation easement landowners.

The more I got involved, the more I understood that OLT is really a facilitator for landowners who want to conserve their property for future generations. And they do it with low administrative and fund-raising costs, which provides a nice return on your donation dollar.

By participating in a small mostly volunteer organization, I also avoid a lot of the fluff that can come out of a large organization. For example, the mission statement. I had no idea if OLT even has one. Yet when decision after decision lead to essentially the same message and purpose, to me that becomes the mission statement.

Cont. on page 2

Witte-Cont. from page 1

Finally, there is the history and passion of the people behind the organization that enticed me to include OLT in our estate plans. As the founder and soul of OLT, Gregg Galbraith started the organization back in the ‘80s and managed to keep it running for years before putting a single person on the payroll. Then of course there is Abigail Lambert, who for the last 20 years has worked tirelessly to protect watersheds on the upper Meramec and other biologically important spring-fed streams.

Even for staff that have moved on over the years, many of them continue to be involved in some fashion or another. This longevity of staff and volunteers gives me a lot of comfort in the future growth and stability of the organization.

In May, Barb and I became landowners with the purchase of riverfront property on the upper Meramec River. It feels good that with a conservation easement we will be able to conserve 65 acres of property that will forever provide a haven for wildlife and people. But 65 is in the grand scheme of things a rather small and finite number. Working together, who knows how many acres and square miles we will help protect?

Jack Witte lives in Des Peres with his wife Barb and their two sons. After retiring from the position of at home dad, he now manages their rental properties and is a school bus driver. Jack’s initial interest in conservation was sparked back in the 4th grade during a dinner conversation about whether china or paper plates are best for the environment. He remembers thinking “they both stink.” Growing up he developed a love of the outdoors at Camp Zoe (now Echo Bluff SP), S Bar F Scout Ranch, the Boundary Waters Canoe Area and family float trips. Today, his inspiration for land conservation comes from reading about the lives of people like Leo Drey and Douglas Tompkins.



The Wittes’ Meramec River property. Photos by Jack Witte



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A Legal and Personal View of Legacy Giving

By Harvard Muhm

Some of my earliest and favorite memories include walking with my siblings and my dad in the forest. He taught us how to recognize trees, not only by their leaves, but also by the shape of the tree, the bark, and any nuts or fruit the tree produced.

During our walks, we saw birds and squirrels, and it was very exciting to find an occasional turkey feather or sometimes even an arrowhead. Most evenings we would go out to look for deer (which, revealing my age, were not nearly so common then as they are today!). The times we shared together were fun and, occasionally, exciting when we would spy a rare siting. These experiences rooted in our family a connection to the land and instilled in us an appreciation of the value of conservation and preservation.



Today, I am an attorney who focuses my practice on estate planning. As part of that process – and particularly for clients who have been blessed with financial success – a fundamental question we discuss is, “What is your wealth for?”

At first glance, the answer to this question seems straightforward: We all want to maintain ourselves and our families in the standard of living to which we are accustomed; we want to protect ourselves and our families from unexpected financial hardship; we want to be able to secure the best medical care available; we want to support our children and grandchildren, including providing for education and healthcare; and we want to enjoy some amount of luxuries,” such as travel and entertainment.

All of those purposes are common and important, and certainly the needs and expenses of clients vary with respect to any of these. (I cannot tell you how frequently I laugh with clients about whether we are saving money so that our children can travel first-class while we’ve spent our lives tucked back in steerage!) But beyond those considerations, the question of *what wealth is for* becomes more challenging for many clients.

In most of these cases, the issue of “legacy” arises, whether it be for family members or the greater good. We create long-term trusts to provide for the security of multiple generations of families. Many clients look in addition to philanthropy. Americans are a generous people, and



Above and below: Muhm family property. Photos: OLT and Muhm family.

charitable giving can be an important element of a family’s culture. Teaching our children and grandchildren to be considerate of our communities and to benefit the world is a legacy most of us desire.

For many members of Ozark Land Trust, one value we share is the importance of protecting the natural environment. The choices for legacy giving are broad and meaningful, and one way to make a lasting impact is by ensuring the long-term protection of those landscapes close to home, right here in the Ozarks.

For some landowners, this might be accomplished with the donation of a conservation easement on their own property, or by donating land outright. For other members, leaving a gift of cash or other assets in their trust or estate will enable Ozark Land Trust to continue to operate far into the future – educating the public about the environment, assisting land-owners with conservation practices, and maintaining and protecting land in perpetuity.

How do you do this? Lots of ways! If you desire to protect your land, you can contact Ozark Land Trust to begin a conversation about options to do so. My own family has chosen to protect our land with permanent conservation easements, with OLT as the steward to ensure it will be protected forever. The staff is knowledgeable and has worked through many, many transactions, with the landowner’s unique conservation goals being the place to begin a conversation. *Cont. on page 6*



Thanks to Our Generous Donors!

We are so grateful to all those who continue to support conservation in our beautiful Ozarks by making a gift to Ozark Land Trust. We recognize all of you who have given to us during 2019 and 2020. This has been a challenging time, and your contributions are truly and deeply appreciated. Happy holidays from all of us at OLT!

List represents gifts received through end of October 2020
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