



# HERITAGE CIRCLE

## Nancy Hart: *Her Legacy*

Nancy Hart has a unique perspective as one of the Western Pennsylvania Conservancy's newest members of the Heritage Circle — she was also one of the staff members who created WPC's planned giving membership program in the late 1990s. Nancy's work in nonprofits, particularly in planned giving, demonstrates an alignment between her career and her personal values.

By the time Nancy came to the Conservancy, she had already experienced a successful 17-year career in banking, from working as a teller at Mellon Bank to an executive role in cash management. But after four years at the Bank of Boston, Nancy decided it was time for a change and began to refocus on her original passions — the arts and the environment. She returned home to Pittsburgh to pursue a graduate degree in public management from Carnegie Mellon University with a focus on nonprofit management.



Northwest view of Fallingwater

As part of her graduate work, she conducted an on-site survey of Fallingwater visitors, and soon realized that the Conservancy embodied her two passions of the arts and the environment. Shortly after graduation, Nancy was hired as the Conservancy's

director of major gifts and planned giving. During her time in this role, she helped create the Heritage Circle and the Leadership Circle programs. She most enjoyed interacting with members at organized hikes and canoe floats. Now she is especially interested in the conservation science aspect of the Conservancy's work, including county inventories through the Natural Heritage Program and research of rare and endangered mussels and hellbenders, Pennsylvania's largest freshwater salamander.

Nancy can trace her original interest in the environment from a pioneering environmental camp where she served as a counselor while in high school. The weeklong program was held at Camp Lutherlyn in Butler County. The teenage guides led fifth graders on hikes and other outdoor activities. But there was one experience that she enjoyed the most.



Nancy Hart in Sochi, Russia

Each day, they sat in the woods for a half-hour of total silence, just listening to the sounds of nature. It was a meditative experience that made a deep impression on her.

Nancy still enjoys the outdoors through biking, hiking and kayaking, and gets a daily dose of nature from living across the street from Frick Park, Pittsburgh's largest regional park.

Her commitment to a value-focused career has led her to her current role as planned giving officer at Presbyterian SeniorCare. This organization holds special significance, as she witnessed the dedication the staff took in caring for her two aunts. She has also included this organization in her estate plans.

"I always knew that the Conservancy would be in my will," she explains. "A will is your autobiography — it reveals what is important to you in your life. I give what I can to charities now, but my bequest is more than I can give in my lifetime."

We thank Nancy for her visionary role in helping to create the Heritage Circle program and her personal commitment to the Conservancy's mission.

*Interested in sharing your story about how you became a member of WPC and the Heritage Circle? We'd love to feature you in a future newsletter! Call Julie Holmes, director of development, at 412-586-2312.*

# With Gratitude for Our Heritage Circle Members

The Western Pennsylvania Conservancy is fortunate to have 140 Heritage Circle members — people who have informed the Conservancy of their intentions to support our mission through their estate plans. Their foresight helps to ensure WPC's ability to protect Western Pennsylvania's best natural features in the future.

If you have included the Western Pennsylvania Conservancy as a beneficiary of your will, trust, life insurance policy or retirement account, please let us know by completing and returning the enclosed envelope. By allowing us to express our appreciation for your commitment now, you will help us to better plan for the future — and demonstrate how your ultimate gift will be appreciated and stewarded. As a Heritage Circle member, you will receive closer access to our work through special mailings, lectures and outings designed just for our closest supporters like you.

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## Ultimate Legacies

Donations made through wills, trusts and life insurance play an important role in achieving lasting results for Western Pennsylvania's water, land and life. Our vision and scope of work would not be achievable without the foresight and commitment of so many loyal donors. We are deeply grateful for the following donors' generosity.<sup>^</sup> Their ultimate legacies are supporting WPC's mission.

Maryanne Kalman, North Palm Beach, Fl.  
— member since 1989

Susan Kramer, Pittsburgh, Pa.  
— member since 1996

John R. Mattern, Pitcairn, Pa.  
— member since 1985

Reverend William A. Smith, Pittsburgh, Pa.  
— member since 1977

\* We are pleased to welcome three new Heritage Circle Members who have notified us of their plans between October 2015 and January 2016.

<sup>^</sup> WPC received bequests from these donors between March 2015 and January 2016.



# Take Advantage of Recent Tax Legislation

Are you interested making a tax-effective gift now to support the Western Pennsylvania Conservancy? New legislation, passed in December 2015, provides two great opportunities.

## IRA Rollover

Thanks to a recent tax code amendment that includes a permanent extension of the IRA charitable rollover, donors 70½ or older can now make gifts of up to \$100,000 per year directly from their IRAs to the Western Pennsylvania Conservancy without having to pay federal taxes on the withdrawal.

Furthermore, such a gift will qualify as a “required minimum distribution.”

**For example:** Ms. Jones is 71 years old and must take the required distribution from her IRA before December 31, 2016. In her case, she must withdraw almost 4% of the total value of her \$800,000 IRA, or \$32,000. She does not need the income for her living expenses, but is still required to withdraw it. In the process, she must pay ordinary income tax on this amount.

Instead of a withdrawal, Ms. Jones makes a direct distribution of \$32,000 to WPC as an outright gift. The amount “rolled over” is not subject to federal taxation and satisfies her mandatory distribution requirement. Because this gift goes directly to WPC, she does not receive an income tax charitable deduction.

The IRA rollover gift gives you a way to take advantage of an incentive in the tax code and make a difference in Western Pennsylvania.

## Conservation Easement Donation

Congress also passed a law that enhances tax incentives for individuals interested in donating conservation easements. A conservation easement is a deed-restriction agreement between a landowner and a land trust that protects the land’s conservation values by permanently limiting the development of the land.

Under the new law, the maximum deduction a person can take in a year for donating an easement to a qualified organization is 50% of the donor’s adjusted gross income (AGI). Qualified farmers and ranchers can deduct up to 100% of their AGI. The deductions can be made for up to 16 years until the full value of the donation is reached. This change was made retroactive to include easement donations occurring after December 31, 2014.

**For example:** Ms. Jones is a landowner earning \$50,000 a year. She donates a conservation easement valued at \$225,000 to the Western Pennsylvania Conservancy. Under the new system, Ms. Jones can deduct 50% of her AGI for up to 16 years or until she fulfills the full value of the easement. In this case, her deduction will be spread over nine years ( $\$25,000 \times 9 \text{ years} = \$225,000$ ).

In addition to gaining a significant tax deduction, Ms. Jones also fulfills her wish to permanently protect her land from future development.

## Your calls are always welcome!

If you would like more information about these options, we would be pleased to talk with you toll free at **1-866-564-6972** or via email at [development@paconserve.org](mailto:development@paconserve.org).



Western Pennsylvania Conservancy



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## Volunteers Needed

Believe it or not, gardening season is just around the corner. The Conservancy is looking for volunteers to help plant or care for our 130 community gardens across 20 counties. Do you have a favorite garden near you? Call Lynn McGuire-Olzak at **412-586-2324** or [lmcguire-olzak@paconserve.org](mailto:lmcguire-olzak@paconserve.org) for more information.



Community garden in Meadville, Pa.

**Mission Statement:** The Western Pennsylvania Conservancy protects and restores exceptional places to provide our region with clean waters and healthy forests, wildlife and natural areas for the benefit of present and future generations. The Conservancy creates green spaces and gardens, contributing to the vitality of our cities and towns, and preserves Fallingwater, a symbol of people living in harmony with nature.

## *Thank You* for Making Our Shared Legacy: *Western Pennsylvania's Water, Land, Life a Success!*

On December 31, 2015, the Western Pennsylvania Conservancy concluded the first comprehensive campaign in its 84-year history. With your support, we raised \$59 million toward ambitious 10-year goals that will lead to increased protection of our land and water resources, more greening of cities and towns throughout the region and continued preservation of Fallingwater for future generations.

Estate gifts were a significant portion of our success. Since the campaign began in December 2010, we received notification from 67 people that WPC is in their estate plans. Additionally, in this five-year period, WPC received nearly \$2.5 million in realized bequests, which enabled us to accelerate our work in Western Pennsylvania.

You, as members of the Heritage Circle, make up an important group whose legacies greatly benefit Western Pennsylvania now and in the future.



This 17,488-acre property in McKean County, protected in 2015, is the largest land acquisition in WPC's history.