



HERITAGE CIRCLE

Conserving Southwoods Farm

Stephen Green was a 15-year-old boy when he first sat on the front porch with his father, Daniel Green, looking out over the overgrown grass of the neglected property. The 50-acre farm sat at a confluence of wetlands, meadow, forest and mountains. Two pristine trout streams intersected there and laced through the landscape.



South Beaver Pond

Stephen's family, natives of Dorseyville, near Pittsburgh, were searching for a hunting and fishing camp in the Southwoods area of Potter County, one of the least populated regions of Pennsylvania. The house itself was without electricity, running water or even a well, but the landscape was stunning and remote, bordered on three sides by the Susquehannock State Forest, the nearest neighbors a mile away.

Now, decades later, Stephen watches from that same porch as a hawk circles over the snow. He recounts how his family first rented, repaired, and then bought the property, referred to as "Southwoods" and lovingly called "the Farm." Stephen and his brother Danny converted it from a camp and retreat into a full-time residence for their mother, Marjorie Green, after their father passed away in 1985. Marjorie, an artist, writer and retired English teacher, lived alone in this wilderness for years.

Stephen, Marjorie and Danny, sharing the same lifelong passions for protecting nature and wildlife, have recently placed a permanent conservation easement on the farm, and have bequeathed the property to the Western Pennsylvania Conservancy through their wills. They're pleased that the

farm and its conservation value will remain intact in perpetuity. "Our mission was always to protect the farm," Stephen explains. "We worked hard on researching who to approach about the easement." Since he grew up appreciating the diversity of what he describes as the Conservancy's "iconic" work, from protecting Pennsylvania landscapes and planting gardens in cities and towns to preserving Fallingwater, the family felt that they could trust the Conservancy with their cherished farm.

The Green family hopes that the history of the property will be preserved as well. The previous owner, Gladys Beebe, was the aunt of the prolific writer Rachel Beebe (pen name Margaret Sutton) who authored the 38-volume "Judy Bolton" mystery books, noted as the longest lasting juvenile mystery series written by an individual author. Margaret, having spent so much of her childhood there, used the farm as the setting for two of her books, "The Black Cat's Clue" and "Puzzle in the Pond." Each Columbus Day weekend, Judy Bolton fans from across the country tour Potter County, including the farm.

Stephen had a wealth of personal experience to draw from in helping his family make their conservation easement plans from his career in environmental compliance and management in industry. He has a bachelor's degree in environmental resource management and a master's in environmental pollution control from Penn State University. He decided that he could be most effective in improving and protecting the environment by working within industry. He enjoyed a very productive career in the steel industry and in corporate environmental safety and health oversight at Westinghouse. He worked on major projects throughout the country to decommission and clean-up industrial and nuclear development comprising the nation's nuclear



Danny, Marjorie and Stephen Green, 2003

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weapons complex. One of the many notable projects is the Hanford Site in Washington state, a 580-square mile nuclear production complex operated by the federal government where the first atomic bomb was created. He ultimately retired from Nucor, a New York steel company, in 1999 to live full-time on the farm with his mother, who is now 98 years old. From the farm, Stephen writes about Southwoods, a lifelong passion.

Stephen also served on the board of the Finger Lakes Land Trust for six years and is currently a board member of the Owasko Flats Nature Reserve in New York. For all of his travels, he feels particularly drawn to his home state of Pennsylvania, especially the wilderness of Potter County.

"Through my experience with industry, environmental and conservation organizations and regulatory agencies, I believe that some of the most effective ways to protect our special places in perpetuity is through land acquisition, conservation easements, and preserving these special places forever," Stephen explained. He is especially pleased that his family decided together to ensure that the farm would remain permanently intact and protected.

The Western Pennsylvania Conservancy is grateful to the Green family and honored to be entrusted with the legacy of Southwoods Farm.

Program Updates

The Conservancy has conserved three properties totaling 513 acres since December 2016. A 186-acre farm in Centre County was permanently protected through a conservation easement donated by Mr. Dale Stover in partnership with the Centre County Farmland Trust. The farm, which is along Brush Mountain near Bald Eagle State Park, had been in Stover's late wife's family since 1945, and will remain a working farm for years to come.

The Helen B. Katz Natural Area in Crawford County continues to expand with the protection of 171 acres. This new property contains forest, wetlands and seasonal pools and has more than 5,600 feet of frontage along Cussewago Creek, a major tributary to French Creek.



One of several beaver ponds within the newest addition to The Helen B. Katz Natural Area

In addition, 156 acres in Bedford County along the Evitts Mountain ridgeline was protected and added to Buchanan State Forest. This property connects with Rocky Gap State Park in Maryland, creating a forested corridor between the two states.



High Meadow at Fallingwater

High Meadow, the newly remodeled lodging and meeting space for students of art, architecture and nature at Fallingwater, won a Silver Award at the 2016 American Institute of Architects Pennsylvania's annual Architectural Excellence Design Awards gala. With sweeping views of the forest and meadow, High Meadow is within walking distance of Fallingwater. High Meadow has already hosted an international convening and onsite residency programs for high school students and teachers, as well as lifelong learners and two artists-in-residence.

Last year marked the beginning of an exciting project to bring beautiful spring color within view of downtown Pittsburgh's riverfronts. Through the Pittsburgh Redbud Project, staff and volunteers planted 222 native trees, including many flowering redbuds, 340 shrubs, and thousands of flowering perennials and grasses last fall.

Over the last two summers, WPC's Watershed Conservation and Natural Heritage programs completed the relocation of the largest number of federally endangered freshwater mussels in the United States. Freshwater mussels play a vital role in water quality by serving as powerhouse water filtration systems. The relocation was necessary due to a bridge replacement project on the Allegheny River in Forest County. In 2016 alone, 24,000 mussels of 12 common species were moved into the Clarion River, and more than 90,000 endangered-species mussels were moved to rivers in Pennsylvania and other states.

Frequently Asked Questions about Estate Planning

Last year, the Conservancy was fortunate to receive nearly \$325,000 in estate gifts from donors who had included the Conservancy in their estate plans during their lifetimes. Each individual legacy contributes to our financial strength and ability to conserve Western Pennsylvania's spectacular land, water, and wildlife and to preserve Frank Lloyd Wright's masterpiece, Fallingwater. Below are some questions that our members frequently ask about estate planning:

Q: What is a planned gift?

A planned gift is part of estate planning. It may be given either during one's lifetime or as part of one's estate to support an institution and its programs. It may be in such forms as cash or other assets, a purchased annuity or a life insurance policy or retirement account that names the institution as beneficiary.

Q: What type of estate documents should I have in place?

It is recommended that anyone with assets or heirs have the basic legal documents of a will or a trust, a medical directive and power of attorney. Without a will, your estate would be considered "intestate," and all assets would be distributed according to state law and not in accordance with any personal intention.

Q: Do I need a lawyer to include WPC in my will?

While some planned giving options, such as some types of charitable giving annuities and trusts, require legal input, there are many free online services that provide a basic will template. It is best, though, to consult your attorney or financial advisor when establishing your estate plans.

Q: What if I am not sure how much money will be left to give?

You can specify a dollar amount, a percentage of your total estate, or whatever is left after your estate obligations are fulfilled. It is also easy to name a charity to receive a life insurance policy or retirement fund that your family may no longer need. There is no minimum, and every gift is appreciated.

Q: What language do I need to include in my will?

To make an unrestricted bequest to the Conservancy, we recommend the following language be added to your will or as a codicil to your existing will: "I give the (sum of \$____), (a specific asset), (____ shares of _____), or (____% of the rest, residue, and remainder of my estate) to the Western Pennsylvania Conservancy, a nonprofit, charitable organization incorporated under the laws of Pennsylvania and presently having offices at 800 Waterfront Drive, Pittsburgh, PA, 15222, to be used for its general purposes."

Q: Can I change my planned gift arrangements at any time?

Yes – you are in control of your will and you can change amounts and beneficiaries. A charitable gift annuity, however, is fixed once it is established and payments begin.

For more information on how to include the Western Pennsylvania Conservancy in your estate plans, please contact Julie Holmes, Director of Development, at 412-586-2312 or jholmes@paconserve.org

New Heritage Circle Members

We are so pleased to welcome the following members who joined the Heritage Circle from October 2016 to February 2017.

Daniel Green

Marjorie Green

Stephen Green

Austin J. Murphy

Anonymous (3)

Your commitment to the Conservancy will help us protect and restore Western Pennsylvania's treasured landscapes and waterways for the future and keep Fallingwater open for future generations to enjoy.



Ultimate Legacies

We are deeply grateful for the following donors' generosity. Their ultimate legacies are supporting the Conservancy's mission.

Jonathan C. Brown, Keswick, Va.
– member since 1985

Yolanda Gonzalez, Lyndora, Pa.

WPC received bequests from these donors between October and December 2016.

Western Pennsylvania Conservancy



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Do we have your current email address?

To receive the Conservancy's monthly e-newsletter and notifications about hikes and other Conservancy events, please send your email address to nwalsh@paconserve.org or register online at waterlandlife.org/13/reports-and-publications.

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.

About the Heritage Circle

The Heritage Circle was created to honor the individuals who have included the Western Pennsylvania Conservancy in their estate plans in various ways, such as:

- Adding WPC as a beneficiary in their current will
- Making WPC a beneficiary of their IRA or retirement fund
- Creating a charitable gift annuity through WPC
- Including WPC as a beneficiary of their charitable remainder or charitable lead trust
- Naming WPC as owner and beneficiary of an insurance policy

Heritage Circle members receive special recognition, special updates and invitations to events throughout the year. If you have included the Western Pennsylvania Conservancy in your estate plans, or would like information about planning a legacy gift, please contact Julie Holmes, director of development, at 412-586-2312 or jholmes@paconserve.org. Of course, you can be a Heritage Circle member and still remain anonymous while enjoying the many benefits.

