

# Newsletter

FALL 2019

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CARE COMES IN ALL SHAPES  
AND SIZES

There are many ways you, like Karla, can support the organizations you love. To find the perfect way to support the zoo, contact Sarah Rutledge at 312-742-9570 or [heritagesociety@lpzoo.org](mailto:heritagesociety@lpzoo.org).



Karla Petersen's gifts honor her lifelong love of animals and support of the zoo.

## A Happy Place

If there's a way to help Lincoln Park Zoo, Karla Petersen most likely does it. As a longtime zoo member, Heritage Society member, and volunteer, Karla's affinity for the zoo runs deep. "I'm at the zoo three or four times each week, and I don't even work here."

Karla's lifelong love of animals, which took hold during a childhood accentuated by domestic cats and dogs, has led to an adult life filled with safari trips and wildlife photography. During her travels, she has searched for jaguars in Brazil's Pantanal and watched lions, elephants, and baboons in the wilds of Africa.

"That's my happy place," she says, "when I'm watching animals be themselves."


Through the zoo's conservation efforts and animal care advancements, Karla has found a way to keep her happy place...happy. While she will miss the zoo's

African lions Sahar, Kamali, and Zalika, for example, she knows the improvements to Kovler Lion House will result in a better home for its future inhabitants.

Karla supports the zoo by making IRA charitable rollover gifts. "It's money I want to give to the zoo anyway, but I get to give even more because I save on my taxes. And it's easy. I simply shoot a note to my advisor and that's it."

And, by adding Lincoln Park Zoo to her estate plan, she hopes to have an impact on the zoo's future, as well.

"When I first did my will a long time ago, I decided to leave money to organizations that are doing something beneficial in the world, including the zoo," Karla says. "It's a commitment...a commitment to the animals here and the animals the zoo helps around the world. And hopefully that work will continue for a long, long time."



All the animals at Lincoln Park Zoo, including Finely the giraffe, benefit when you include the zoo in your estate plan.

**For your IRA charitable rollover gift to qualify this year, we must receive it by December 31.** If you have check-writing privileges on your IRA account, please mail your check by December 20 to give us time to process your gift before the end of the year.

# How to Maximize Your Retirement Plan Assets

**W**hen given to your family, a portion of your retirement plan assets will be consumed by taxes. Instead, leave assets that are less heavily taxed (such as real estate, cash, or life insurance) to your family, and consider using your retirement plan assets to make gifts to tax-exempt charitable organizations, such as Lincoln Park Zoo.

To name the zoo as the beneficiary of your retirement account, simply instruct the retirement plan administrator of your decision and sign the required designation form.

There are many benefits to donating retirement plan assets.

- Make the most cost-effective gift you can make and save other less-taxed assets for loved ones.
- You can change your mind at any time.
- Eliminate all federal income taxes when you name the zoo as the sole beneficiary. (Receive partial savings when you give us a specific amount before giving your family the remainder.)

- Name Lincoln Park Zoo as the contingent beneficiary, allowing for greater flexibility.

## **For Those 70½ or Older**

If you're 70½ or older, you can use the IRA charitable rollover to make a tax-free gift to the zoo. This law allows you to transfer up to \$100,000 directly to a qualified charitable organization without paying income tax on the distribution. Better yet, your gift will be put to use today, allowing you to see the difference you're making for our animals and visitors.

- You pay no income taxes on the gift. The transfer doesn't generate taxable income or a tax deduction, so you benefit even if you do not itemize your tax deductions.
- Your gift can satisfy your required minimum distribution for the year.



# Growing Stock, Growing Generosity

## How a Gift of Stock Can Be Win-Win

If you own stock that's increased in value since you purchased it (and you've owned it for at least one year), you have a unique opportunity for philanthropy. When you donate securities to Lincoln Park Zoo, you receive the same income tax savings (if you itemize) that you would if you wrote the zoo a check, but with the added benefit of eliminating capital gains taxes on the transfer, which can be as high as 20 percent.

Making a gift of securities to support the zoo's programs, services, and animals is as easy as instructing your broker to transfer the shares or, if you have the physical securities, hand-delivering or mailing the certificates along with a stock power to the zoo in separate envelopes.

Using assets other than cash also allows you more flexibility when planning your gift, and there are even more potential benefits if you plan your gift creatively. For example, if you aren't ready to give up these assets during your lifetime, a gift of securities through your will or living trust allows you the flexibility to change your mind at any time. You can continue to receive dividends and participate in shareholder votes, and the securities are still yours if you need them for other expenses.

### Become Our Newest Member

When you include Lincoln Park Zoo in your future plans, you become the newest member of our Heritage Society. Along with our heartfelt gratitude, members of the Heritage Society receive:

- Invitations to the Annual Heritage Society Luncheon and Fall Cocktail Reception
- An invitation to the zoo's annual meeting
- The award-winning Lincoln Park Zoo magazine
- The satisfaction of knowing your gift will help ensure a strong future for the zoo

**Contact Sarah Rutledge to learn more about the Heritage Society or to notify us of your gift.**

★ **To learn more about how to donate stock to the zoo**, simply contact Sarah Rutledge at 312-742-9570 or [heritagesociety@lpzoo.org](mailto:heritagesociety@lpzoo.org) to see how this gift can be win-win.

Donating securities to Lincoln Park Zoo means maximizing your generosity while helping to provide expert care to animal babies.



Regenstein Small Mammal-Reptile House is home to many diverse species with unique needs, including Henkel's leaf-tailed geckos.



## Care Comes in All Shapes and Sizes

Small mammals, reptiles, and amphibians come in all shapes, sizes, textures, and colors. From itty-bitty cactus mice to hefty spectacled caimans, each species—and individual—at Regenstein Small Mammal-Reptile House has its own set of needs.

Curator Dan Boehm and keeper staff care for all of them, a challenge requiring eclectic knowledge of each animal.

Several venomous species reside at Small Mammal-Reptile House, including Rio Fuerte beaded lizards, Aruba Island rattlesnakes, and a white-blotched river stingray. Only specially trained staff care for these species.

“You have to have the right mindset to work with venomous animals. You have to be patient, calm, and calculated,” says Boehm.

Some of the animal house’s slimiest residents present some of the stickiest dilemmas. Each species can require a precise temperature range, water pH

level, curated diet, humidity level, and specific plant life in their habitat—sometimes all at the same time.

However, in the Ecosystem area, stingrays, turtles, sloths, monkeys, and tamarins co-exist in a single habitat thanks to some ingenious designs.

Since sloths are nocturnal, they eat after hours when the monkeys are in their behind-the-scenes spaces. And to ensure the tamarins have a place to enjoy some privacy, their nest boxes are purposefully too small for the larger saki monkeys.

These intentional modifications help promote positive welfare for the animals and provide an idyllic habitat where multiple species can live together. Be sure to check out how each piece of the puzzle fits together during your next zoo visit!

**Your gifts help ensure we can provide our animals with the best possible care and habitats.** Contact Sarah Rutledge to learn more about ways you can make a lasting impact on the zoo.



**LINCOLN PARK ZOO.**  
Heritage Society

### Make a difference.

Give to the zoo so that we can continue to advance animal care, education, science, and conservation—and ensure future Chicagoans enjoy an exceptional, free zoo experience. Please contact us today.



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