



**LINCOLN PARK ZOO.**

2001 North Clark Street  
Chicago, IL 60614

Heritage Society  
Newsletter



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Heritage Society

FALL  
2021

# Newsletter

## INSPIRING IMPACT

When it comes to making an impact, Heritage Society member Elizabeth Price looks for ways to make hers go further. That's why, together with fellow Heritage Society members Geoffrey Anderson, Clarice Norin, and Barb and Glen Grossklags, Elizabeth created a \$100,000 challenge match to double Heritage Society members' Annual Fund donations to help the zoo recover from the financial impacts of the COVID-19 pandemic.

Heritage Society members stepped up in a big way, many making new or increased gifts. These gifts help pay for animal care, conservation initiatives, and learning programs—all while ensuring the zoo remains admission-free.

A zoo supporter for more than 40 years, Elizabeth believes in the importance of being generous.

"I've always loved the zoo. I'm proud of its conservation, horticulture, science education and community engagement programs—and, most of all, that everyone can visit because it's free," says Elizabeth. "I have the ability to give back, so I want to do as much as I can. This match was a great way to make my donation go further and encourage others to give—making a much bigger impact for the zoo."



Elizabeth Price,  
*Heritage Society member*

Elizabeth also realizes that there are other ways to be generous, too. That is why she made the decision years ago to include Lincoln Park Zoo in her estate plan. Her commitment will someday help sustain the free zoo that has been so important to her over the years—guaranteeing future generations of Chicagoans will have access to a world of wildlife right in their own backyard.

## We're Here to Help

Let us partner with you in your planning process. Contact Sarah Rutledge at 312-742-9570 or [heritagesociety@lpzoo.org](mailto:heritagesociety@lpzoo.org) with any questions. We are happy to help.

# LIVING A GENEROUS LIFE

Why do you give? Do you want to make a real difference? Is your generosity a reflection of your values, or a way to inspire others to give?

Whatever the reason you support Lincoln Park Zoo, it's natural that you would like our mission to continue. You can help the zoo save species and remain free for future generations. How? By making a future gift as part of your legacy.

## Create Your Legacy at Lincoln Park Zoo

You can continue your generosity long after your lifetime.

### Some options include:

- **Percentage giving.** Through your will, you can designate percentages of your estate as you see fit. For example, designate 5% of your total estate to Lincoln Park Zoo, while leaving 95% to loved ones.
- **Blended giving.** Give an outright gift of cash or other assets today, combined with a future gift, such as naming the zoo in your will.
- **Beneficiary designation.** A simple form is all it takes to name the zoo as a beneficiary of your retirement plan assets, unneeded life insurance policy or donor-advised fund.

**Your life's work (and subsequent legacy) is your opportunity to make a statement. Whatever the reason behind your giving, we are here to help you fulfill your goals. Contact Sarah Rutledge at [heritagesociety@lpzoo.org](mailto:heritagesociety@lpzoo.org) or 312-742-9570 with any questions.**



## Your Gift Matters

While admission is **free**, it costs more **than \$80,000 per day** to operate the zoo. **One person** can make a difference for the zoo's animals, worldwide conservation efforts, and state-of-the-art learning programs. **Your gift directly impacts the zoo at every level**, from feeding the animals to keeping the zoo free.



\$11.3M

Animal Care and Conservation



\$6.4M

Buildings and Grounds



\$4.7M

Learning and Community Engagement Programs



\$2.9M

Visitor Services



\$2.7M

Administration



\$2.1M

Development and Membership

*\*for the period of April 1, 2019 - March 31, 2020*



# LET'S TALK

## 3 Conversations to Consider Before Making a Gift in Your Estate Plan

Think of the biggest decisions you've made in your life: moving to a new town, making a major purchase, changing jobs, retiring. How many of those decisions did you make only after consulting loved ones, experts, or both? Probably most or all of them.

Choosing to include a charitable gift in your estate plan is no exception. For peace of mind, it helps to talk to these critical "team members" as part of the process.

### Your Loved Ones

You likely have loved ones whose input you value. And you may want to provide for them after your lifetime. Balancing that with a desire to help our mission in the future is easier than you may think, thanks to percentage giving.

#### Conversation Starters

- "Providing for you is one of my top priorities."
- "I also want to help advance animal care, education, science, and conservation after my lifetime. That's why I plan to give \_\_\_% of my estate to Lincoln Park Zoo."

### Your Financial Planner

Reach out to a trusted advisor to ensure your charitable vision aligns with your financial goals.

#### Conversation Starters

- "I would like to give a specific amount to my favorite nonprofits. How can I make it fit with my long-term financial plan?"
- "What are the best ways to give for my personal financial situation?"

### Your Favorite Nonprofits

We are always happy to answer your questions. Plus, notifying us about your gift ensures that your wishes are carried out as you intend.

#### Conversation Starters

- "How will my gift impact Lincoln Park Zoo?"
- "What are the zoo's plans and goals for the future?"

## Let's Talk!

Contact Sarah Rutledge at 312-742-9570 or [heritagesociety@lpzoo.org](mailto:heritagesociety@lpzoo.org) to start the conversation about your future impact today.

# IMPORTANT YEAR-END CONSIDERATIONS

## It's Just as Great to Give as to Receive

We know that your decision to support Lincoln Park Zoo comes from the heart. An added bonus is that your gift may also qualify for a tax break this year when you itemize deductions on your federal income tax return.

### Assets You Didn't Know You Had

Here are some assets you may not have considered and the impact they can have on your taxes when you use them charitably.

#### IRA Distribution

- If you are 59.5 years or older, you can take a distribution from your IRA and then make a gift to Lincoln Park Zoo without penalty. If you itemize your deductions, you can take a charitable deduction for the amount.
- If you are 70.5 years or older, you can give any amount up to \$100,000 per year from your IRA directly to Lincoln Park Zoo. You will not pay income taxes on the transfer. If you are 72 or older, you can use this transfer to satisfy your required minimum distribution.

**To do:** We must receive your gift by Dec. 31 for your donation to qualify this year. If you have check-writing privileges on your IRA, please be sure to mail your check early in the month to allow time to process your gift.

#### Appreciated Stock

You may enjoy two tax benefits with a gift of appreciated stock: Avoid paying taxes on the appreciated value, and qualify for an income tax charitable deduction based on today's market value when you itemize.

**To do:** Complete all transfers by Dec. 31. This includes electronic transfer, hand-delivery of the securities or mailed stock and stock power (mailed separately for security).

#### Donor-Advised Fund

Contribute to a donor-advised fund and enjoy a tax savings on that amount when you itemize.

**To do:** Complete the contribution by Dec. 31. You do not have to designate the funds this calendar year to receive the tax benefits.

### Who's on Your List?

As we approach the end of the year, we're happy to help ensure that you can support Lincoln Park Zoo and also get the most benefit. Please feel free to contact us for free resources.



### Make a difference.

Your gift to the zoo will help us 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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312-742-9570

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2001 North Clark Street, Chicago, IL 60614 [heritagesociety@lpzoo.org](mailto:heritagesociety@lpzoo.org) [lpzoo.org](http://lpzoo.org)

# Yes, I'd Like to Learn More!

Please complete and return this reply card in the enclosed envelope today.

- I am interested in supporting Lincoln Park Zoo with a gift in my will or trust. Please send me sample bequest language to share with my estate planning attorney.
- I would like to know more about making a gift to Lincoln Park Zoo before the end of the year. Please contact me to discuss the details.
- Please tell me how my estate plan can make a difference for animals and visitors at Lincoln Park Zoo.
- I've included Lincoln Park Zoo in my estate plan, but haven't yet notified you. Please send me the benefits of joining the Heritage Society.

**On the back of this card, please tell us about your connection to Lincoln Park Zoo and why it's important to you.**

***Thank you for your continued support of our animals!***

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Name (Please print)

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Telephone

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Email

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Address

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City, State

ZIP

We respect your privacy. Information collected here will not be shared outside of our organization without your permission.



Place  
Stamp  
Here

LINCOLN PARK ZOO  
2001 NORTH CLARK STREET  
CHICAGO IL 60614-4757

