



LINCOLN PARK ZOO.
Heritage Society



Crowned lemur

SPRING
2021

Newsletter

THANK YOU

During these unprecedented times, Lincoln Park Zoo has become a beacon of comfort, sharing exciting animal news and uplifting content. While the world remains at a standstill due to the coronavirus, life and care at the zoo continue.

On grounds, essential staff, including the zoo's dedicated Animal Care and Veterinary Services teams, are still providing unparalleled care to the nearly 200 unique species at the zoo. In addition to their normal duties, keepers are going the extra mile, sharing behind-the-scenes photos and videos to keep avid zoo followers connected with their favorite species.

Due to the efforts of our horticulture team, Lincoln Park Zoo's herbaceous perennial collection was granted national accreditation status by the Plant Collections Network last fall. The small but mighty group of horticulturalists is now working hard to prepare the zoo's gardens and grounds for spring. Lincoln Park Zoo scientists have been busy in the field and at home working



Grevy's zebra foal Abra was born August 14.

on publications. Steve Ross, director of the Lester Fisher Center for the Study and Conservation of Apes, and Lydia Hopper, assistant director, edited *Chimpanzees in Context*, featuring a forward by Jane Goodall.

We are excited to safely welcome you back to experience and celebrate these achievements in person. All of this would not be possible without the steadfast support of our zoo family. Thank you.

“I, like many people, spent most of my life career-focused. As my retirement years came into view, I saw the opportunity to give back. Animals have always been a love of mine, so I began volunteering at Lincoln Park Zoo and joined the Heritage Society. As a member of the Heritage Society, I've met a number of incredible zoo staff and learned so many interesting things, but most of all, I am proud to be part of keeping the zoo free and accessible to all.”

—CAROL OVERMAN



PLANNING CHECKPOINTS FOR EVERY AGE

Western lowland gorilla Djeke.

Generosity takes on new meaning as we grow older, build financial resources, and set charitable goals. These planning checkpoints, arranged by age group, outline how to maximize your generosity to the causes that matter the most to you.

50s Update your will to reflect any life changes, such as beginning a new relationship or grown children leaving home. Meet with a financial advisor to review your investments and savings—there's still time to make catch-up contributions for retirement.

Best Ways to Make an Impact

- **A gift in your will or trust.** This costs you nothing today and can be made by adding one sentence to this document.

- **Retirement plan assets.** Name Lincoln Park Zoo as a beneficiary of part or all of your retirement plan assets. It takes minutes to contact your plan administrator or complete the change-of-beneficiary form online.
- **Life insurance policies.** If your children are grown and financially stable, consider donating these to the zoo.
- **Donor-advised funds.** This popular, flexible option allows you to open a fund at a community foundation or sponsoring organization and recommend how much and how often money is granted to qualified charities like the zoo.
- **Appreciated securities.** Donate stocks you've owned for longer than one year and receive an income tax charitable deduction when you itemize. You can also eliminate capital gains taxes.



Harbor seals lounge at Kovler Seal Pool.

60s

Check with your financial advisor to make sure you are on track with retirement savings. If you've already retired, revisit your expenses, priorities, and health care needs.

Best Ways to Make an Impact

- **Life income gifts.** If you are looking for income in retirement, consider establishing a *charitable remainder trust* and use appreciated assets to maximize your tax benefits. You receive income for life from the trust, with the rest supporting Lincoln Park Zoo after your lifetime. If you have a high net worth and are looking to minimize taxes, a *charitable lead trust* allows you to support the zoo now and provide for loved ones in the future.
- **Beneficiary designations.** Review the beneficiaries of your life insurance policies and retirement plan assets. Many of these assets may result in a large tax hit for your family, but they pass tax-free to Lincoln Park Zoo.
- **Bank or brokerage accounts.** Most states* allow you to designate one or more individuals or charities as a beneficiary of a checking or savings account, certificates of deposit, or brokerage or investment accounts.

* State laws govern payable-on-death accounts and transfer-on-death accounts. Please consult with your bank representative or investment advisor if you are considering these gifts.

70s

Discuss your giving goals with your family and meet with your financial advisor to align your financial and philanthropic plans.

Best Ways to Make an Impact

- **Gift from your IRA.** If you are 70½ or older, give any amount up to \$100,000 per year from your IRA directly to a qualified charity such as Lincoln Park Zoo without having to pay income taxes on the money. If you're 72 or older, the gift also counts towards your required minimum distribution.
- **A charitable gift annuity.** Receive fixed income for life and qualify for tax benefits when you transfer assets, such as cash or securities, to Lincoln Park Zoo. After your lifetime, the remaining balance supports our zoo.

What's Right for Your Stage?

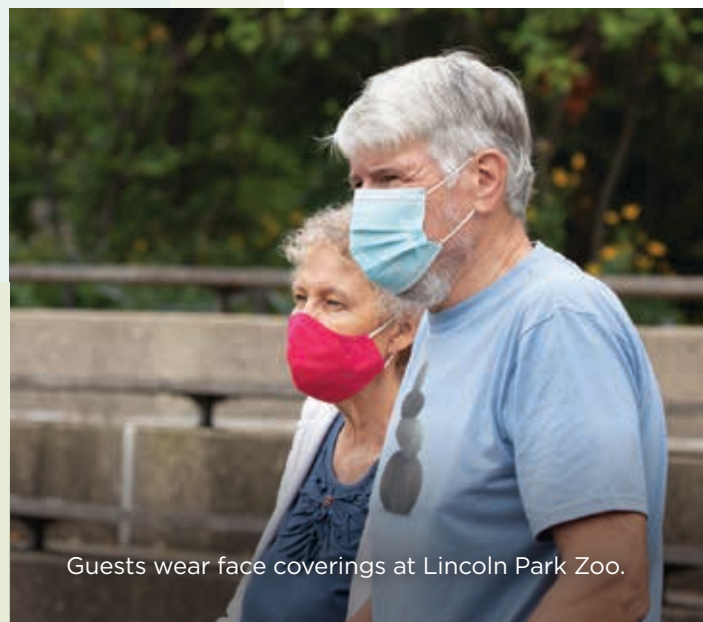
We're ready to work with you and your professional advisor to discuss a variety of giving options that work best for your personal circumstances. Please contact Sarah Rutledge at heritagesociety@lpzoo.org or 312-742-9570 to get started.



African spoonbill Lucia was born June 5, 2020, to parents Luke and Annabelle.



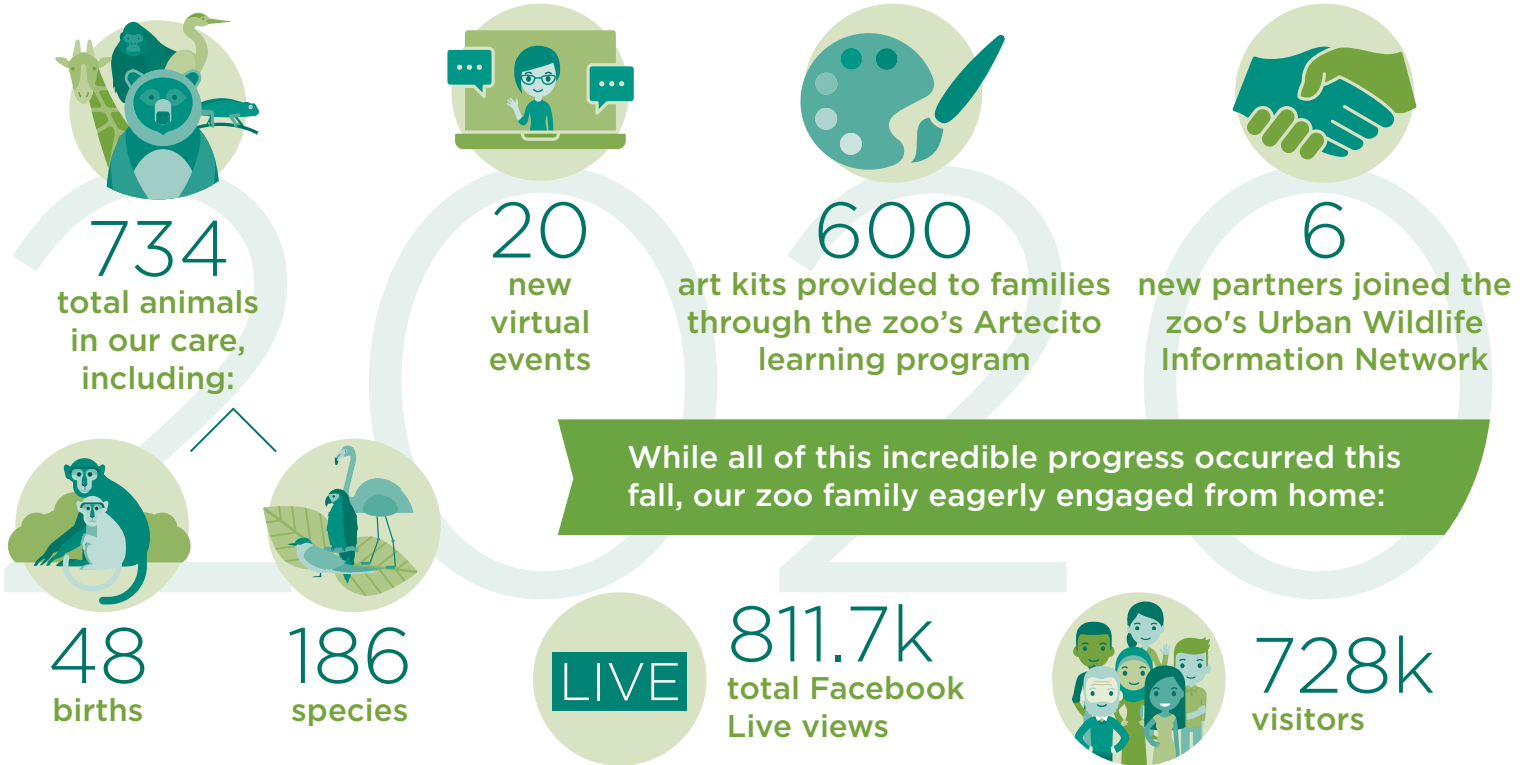
Giraffes and Patsy the aardvark explore Regenstein African Journey.



Guests wear face coverings at Lincoln Park Zoo.

A LOOK BACK

Despite the odds, **2020 was an incredible year** at Lincoln Park Zoo thanks to you.



To join the Heritage Society or to learn more about the many ways to make an impact on the zoo's future, please contact Sarah Rutledge at 312-742-9570 or heritagesociety@lpzoo.org.



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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