

Dutchess Land Conservancy Legacy Society Planned Giving Case Statement

Our Legacy

In the 1950's Kent Leavitt, who owned Fraleigh Hill Farm in Stanford, became interested in preserving open space and farming in the northeast part of Dutchess County. He formed the Northeast Dutchess Open Space Committee which promoted education and efforts to preserve open land. After Mr. Leavitt's death in 1973, the Northeast Dutchess Open Space Committee essentially disappeared from the public eye.

In the early 1980's a potential developer secured options on the Sheldon, Van Benschoten and James Cagney farms on Bangall Amenia Road in Stanford. An article appeared in the New York Times showing the subdivision of the Sheldon farm into house lots. This galvanized several local people, who cared deeply about the rural character of this area, into action.

Leslie Barclay, Kent Leavitt's niece, and a small group of area residents realized a local land conservancy was needed, so she arranged to meet with the Brandywine Conservancy in Pennsylvania to learn all they could. On their return, they solicited two years worth of financial support from a small group of backers and started the legal work to create the Dutchess Land Conservancy (DLC).

The Legacy Continues

Since our founding in 1985, DLC has protected over 39,000 acres of important farmland, precious water resources, irreplaceable wildlife habitat and scenic views for the benefit of our community today and for the future. Through voluntary land transactions with private landowners, conservation land planning assistance and continuous public education, we work to protect land while helping to channel new growth in ways which will reinforce our natural and agricultural landscapes and create balanced and sustainable communities. At DLC we believe that a healthy economy and a healthy environment go hand-in-hand.

We are lucky to work with people who understand how connected we are to the land. Our food is grown here, our trees produce oxygen, the ground filters our water, we love using the land for recreation, we share it with wildlife, and we are just starting to understand how important our ecosystems are to our health and well-being. And we also possess some of the most awe-inspiring views in this country. This is why protecting our land and ensuring that it remains open is so important.

The Legacy Grows

Dutchess Land Conservancy stands up for what it believes in, commits itself to its social responsibility to permanently protect and steward the land in its care, and ensures its promise to carry out its obligation to oversee and enforce the terms of its easements, ensuring the land remains open in perpetuity.

Our land conservation work is the fiber that weaves through our local communities and ties them together. Every community we serve directly benefits from our programs.

Our work is also "marathon," and long-term - holding easements requires an ongoing commitment to stewardship activities, and DLC has promised to oversee and enforce its easements forever. As we continue to protect more and more land, our stewardship responsibilities continue to increase. In addition, as land changes hands, new landowner relationships and partnerships must be forged. And if we face an unfortunate challenge that requires a legal enforcement action, expenses can be extremely high and we need to make sure we have the resources to defend our easement program. It's vital that we uphold our promise to the public and ensure the integrity of every property we conserve in perpetuity.

Your Legacy

We appreciate the fact that you already have a significant and meaningful long-term relationship with DLC.

We ask that you take the next step and making DLC's Legacy your own by ensuring that future generations will have access to the open space that gives Dutchess County the rural character we know and love.

Why a Planned Gift?

When you include Dutchess Land Conservancy in your long-term financial plan, you ensure that we continue to have the necessary resources to protect and forever steward our open spaces, farmland, wildlife habitat, forests, water resources and some of the most spectacular views in the country in perpetuity!

You also have the ability to make an important impact that doesn't cost you anything during your lifetime, but that is priceless as part of the legacy that you leave behind.

Knowing that you are committed to making a planned gift to DLC enables us to better plan for the future, making sure our strategic initiatives are aligned with our ongoing resources and our donors' intentions. Your planned gift to DLC will enable us to fulfill our mission well into the future.

Gifts to DLC

When making a gift to DLC you can simply make a gift, or maybe you prefer to choose how that gift will help further DLC's conservation and stewardship goals:

- *Non Directed Gifts:* Gifts that are not specifically directed by the donor will be placed in DLC's Board Designated Stewardship Fund to help assure our ability to uphold our promise to oversee and enforce our conservation easements in perpetuity.
- *General Support:* You can designate that a gift is to be used for general support. The funds are then used to further DLC's mission as directed by the Board.
- *Land and/or Easement Acquisition:* DLC accepts gifts to our restricted Land and Easement Acquisition Fund to buy important land or conservation easements.

Planned Giving Strategies

Direct Donation

A direct donation involves a contribution of cash, securities, real estate or other property to Dutchess Land Conservancy.

Donor-Advised Fund

A public charity pools donations from donors and invests them. The fund then makes grants to nonprofit organizations like DLC based upon donor recommendations. Donor-Advised Funds can be established through organizations like the Berkshire Taconic Community Foundation and the Community Foundation of Dutchess County.

Charitable Bequest

A bequest involves naming DLC in a will. This provides a gift to DLC when the donor passes away. Donors can leave a percentage of their total estate, a specific dollar amount, or they may leave what is left after all other bequests have been fulfilled. Bequests are one of the most common types of planned gifts. Naming DLC in your will is easy and helps you leave an important legacy behind for you and for your family.

Bequests are:

- Easy—when drafting your will, your lawyer or estate planner can help you add DLC into the document in a way that is meaningful to you and that makes sense for you and for your family.
- Revocable—you have the ability to alter your bequest at any time to meet your needs or the needs of your family.
- Flexible—your charitable bequest can provide important support to any of your favorite DLC programs or services. You can also give a gift to the programs and services that need it most by giving an unrestricted gift through your bequest.
- Smart—charitable bequests are not subject to federal estate taxes, which means you can provide more to your family and to DLC. A bequest also costs you nothing today so you can live comfortably knowing that you are offering important support to DLC as part of your lasting Legacy.

Sample bequest language:

“To Dutchess Land Conservancy, a New York nonprofit organization, at P.O. Box 138, 4289 Route 82, Millbrook, NY 12545, for (insert percentage of estate or dollar amount here) to be used for (insert program of choice here) or for general purposes as determined by the Board of Directors.”

Beneficiary Designation

Beneficiary designation involves naming DLC as a beneficiary of an asset or insurance policy. This helps you give to an important cause without paying the estate tax or the tax that is charged when individual beneficiaries receive the transferred funds. Simply request a “Change of Beneficiary” form from your plan administrator and add Dutchess Land Conservancy, Inc. as the, or one of the, beneficiaries.

Charitable Remainder Trust

A charitable remainder trust is an irrevocable trust that provides payments to donors and/or loved ones during the term of the trust, and the remainder to DLC at the end of the trust’s term.

Conclusion

We are fortunate that the people we work with love and respect the land and choose to be good stewards of our precious resources. We thrive in a community that understands land is fragile, and that once it’s gone, we can’t get it back. Together we are doing our part to leave our world a better place. What a great legacy to choose – to protect this area so that it retains its special sense of place forevermore.