

# Blue Hill Heritage Trust

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## The Stewards' Circle

### *An Opportunity to Leave a Lasting Legacy*

To honor the people who have chosen to leave a lasting legacy by providing critical assistance to our work through bequests and other planned gifts, the Trust has created The Stewards' Circle.

We are lucky enough to have been the beneficiary of several such gifts, and numerous other members have told us that they have named us in their wills. This type of support is essential for us to keep our promises to protect our portfolio of conservation lands in perpetuity. It is also a way for many of our members to make a substantial gift to something they care deeply about, but are not able to do during their lifetime.



# A Gift of a Mountain



View of Blue Hill Mountain

## Louise Frederick Deeply Loved Her Town of Blue Hill and Its Mountain



Blueberry picking for all on Trust properties on Blue Hill Mountain and Caterpillar Hill.

Thanks to the far-sighted generosity of Louise Frederick, a descendant of one of Blue Hill's earliest settlers, thousands of people are able to enjoy a hike up Blue Hill Mountain and take in the glorious view from the summit. In 1989, Louise donated a conservation easement to Blue Hill Heritage Trust on 79 acres of family land on the mountain that included the summit and the hiking path now known as the Osgood Trail. The easement prevented future development on the land and allowed the Trust to restore and manage the trail for public use.

When Louise died in 1998, her will granted full ownership of the land to the Trust — and more. Reflecting her deep love for her town and “her mountain” as well as her high regard for the Trust’s work, this magnificent bequest also included her home across the street. As she suggested, the house was sold and the proceeds used to support the Trust’s

work. This “second gift” allowed us to build our stewardship endowment to help support the future management costs of the Osgood Trail (named in memory of her family) as well as to acquire other adjacent lands on the mountain for conservation purposes. This was a planned gift that was an important investment in our community, one that pays dividends every single day to both residents and visitors.

Successful land conservation requires time, resources, skilled professionals and many friends. To carry out our work, we must build a strong, financially sound and sustainable organization.



**There are many ways to make a contribution and conserve the special qualities of our “back yards.” We hope our landscape and our record of achievement in protecting it will inspire you to plan a gift that is right for you.**



### The Giving of a Homestead

Pam Johnson, one of our most devoted members, has engaged in some planning, that activity that we are so often encouraged to undertake but so frequently put off until another day.



The major financial asset in her estate is her home, a beautiful old cape located on a piece of land she has carefully stewarded for many years. She decided that she would like the Blue Hill Heritage Trust to have it when she dies and has made that a provision of her will.

Recognizing that her property may not have the qualities that would warrant conservation protection (by easement),

Pam has specifically provided that the Trust may sell the house and property and use the proceeds for funding stewardship activities. As much as she would like to see her two-century-old farm retain

its historical character and use, she is more interested in having the Trust derive benefit from the property's value. She sees this planned bequest as a way to make a major gift to an organization that she cares deeply about, the sort of gift she is not able to make during her lifetime. Pam is pleased with her decision; we are honored and grateful.



## A Silent Supporter

### The Legacy of an Unrestricted Gift



Robert Jordan lived humbly and frugally. A local resident, he grew Christmas trees on his land and sold them to passers-by. He never married and his family all predeceased him. When he died, his obituary was short. It gave no clue that he was a shrewd investor with a surprisingly large estate, or that he had a very generous community-minded spirit.

Though Mr. Jordan had never been a member of Blue Hill Heritage Trust, it turns out that he was one of our quiet supporters. He clearly believed in the importance of the work we are doing to protect the special land resources of the Blue Hill Peninsula. Though "planned giving" probably would not have been a phrase he would have used himself, the depth of his support was expressed in his

will; the Trust was one of several community non-profit organizations to receive a portion of his estate.

That unrestricted gift allowed us to acquire a critical addition to our Kingdom Woods Conservation Area, a wonderful natural area supporting a variety of wildlife, the kind of place we think Mr.



Over 18 miles of hiking trails and access points to local water resources are maintained by the Trust.



## The Importance of Planned Gifts

Your gift will provide capital dollars for the essential parts of our work. They can help fund new land protection projects, support ongoing stewardship activities and build recreational trails and parking. All gifts, unless otherwise specified by the donor, will help build our stewardship fund, which is an essential element of our financial base.

Jordan would have enjoyed. It also allowed us to build our organization's operating endowment, which will help support our work into the future. We like to think that Mr. Jordan would have enjoyed the smiles on our faces when we received news of his surprising gift.





## What Is Right for You?

Each of us has a different vision for what we would like to leave behind and how we wish to be remembered. We hope the following information will spark your interest in finding a form of planned giving that is right for you and will help you start a conversation for such a gift. We encourage you to contact your accountant, lawyer, or financial advisor to discuss the details of a planned gift. Also, please contact us if you would like more information about planned giving possibilities. Below are some ideas for your consideration.



### Bequests

**The simplest and most common of planned gifts**, a bequest, can be made through your will, trust or beneficiary plan. Bequests allow you to retain ownership and management of your assets during your lifetime. They allow you the opportunity to make a gift that might not have been possible during your lifetime.

■ **Make a general bequest in your will**, in which you bequeath to Blue Hill Heritage Trust all of your real, tangible or intangible property or a cash legacy in which you bequeath a percent of your assets or a specific sum. The following language can be used in your will:

“I give to Blue Hill Heritage Trust, a non-profit land conservation trust located in Blue Hill, Maine with Tax ID Number 22-2655830, the sum of \$\_\_\_\_\_ [or \_\_\_ percent of my estate] to be used for the general purposes of Blue Hill Heritage Trust.”

### Change Your Beneficiary

■ **Make us a beneficiary of your retirement plan or your life insurance policy.** This is a simple way to make a planned gift. This process does not require you to contact your lawyer or change your will. Simply ask your plan administrator for a change of beneficiary form.

### Real Estate

**A gift of real estate** might fit with our core work to protect land that has special significance because of the ecological, natural, agricultural, scenic, cultural or recreational value. Not all land is appropriate for conservation. We encourage anyone who might be contemplating a gift of real estate to talk with us early in the planning process. Some types of real estate gifts include:

■ **Land appropriate for conservation** – We evaluate each potential land gift against a set of criteria to determine whether an individual parcel of land should be permanently conserved. If we accept a gift of land for conservation purposes, our ownership comes with the responsibility for managing it in perpetuity.

■ **Other real estate** – When a parcel of real estate is not appropriate for the Trust to own as conservation land, a gift of such real estate can still provide a major boost to our work if it comes to us with the express understanding that the real estate may be sold and the proceeds used to benefit our work.

■ **Flexible timing** – A donor may bequeath land, a home or farm to the Trust upon his or her death. Or a donor may bequeath property during his or her lifetime while reserving the right to continue to live on the property (and receive income tax benefits by doing so).

### Other Forms of Planned Giving

- Create a **Charitable Remainder Trust**
- Create a **Charitable Lead Trust**
- Make **Memorial Gifts** by providing for the Trust to receive donations in your memory upon your death



## Leave a Legacy

Make a planned gift and join our **Stewards' Circle**

For additional information about planned giving opportunities, contact:

**Blue Hill Heritage Trust**

207-374-5118

[info@bluehillheritagetrust.org](mailto:info@bluehillheritagetrust.org) • [www.BlueHillHeritageTrust.org](http://www.BlueHillHeritageTrust.org)