

# FRIENDS



Welcome to *Friends*, a newsletter for people committed to helping NOLS provide the world's best education in wilderness and leadership skills. This publication aims to provide useful and interesting information on charitable gift planning and the people who support NOLS.

SUPPORTING EXCELLENCE AT NOLS • MAY 2004

## Finesse, Flexibility and Balance

BY ANNIE DALLAS

The sport of sea kayaking might also be classified as an art—one that requires finesse, flexibility and balance. Comparing these fundamentals with the character of Fred Kleisner, it's no surprise to hear this man say he was “born to kayak.”

All three qualities are essential for Fred, who, in addition to serving on the NOLS Board of Trustees, is Chairman and Chief Executive Officer of Wyndham International, one of the nation's premier hotel and resort companies.

Fred was first struck by NOLS upon the return of his daughter, Heather, from her semester course. “We sent off a little girl, and three months later, a young lady stepped off the plane,” Fred recalls. “It was immediate and obvious that NOLS was a maturing experience.”

When Heather took a summer job at NOLS Rocky Mountain later that same year, Fred and his wife Johnna came to Lander and were surprised to learn that NOLS had shorter courses for students over 25. Fred decided right then to sign up for a course.

It was on Fred's second NOLS course—sea kayaking in Prince William Sound—that he solidified his connection with NOLS and found himself a natural seaman. It was also on this trip that Fred met



NOLS trustee Fred Kleisner, shown here in Alaska's Prince William Sound, discovered on his 1993 Sea Kayaking course that he was “born to kayak.”

NOLS Executive Director John Gans. “Fred was a wonderful student,” says John. “He was an engaged expedition member with a wonderful sense of humor and a great love for the wilderness. His enthusiasm matched that of any 14-year-old student and was accompanied by the wisdom of an experienced leader.”

The relationship catalyzed Fred's activity on the Advisory Council and, subsequently, his current role on the Board of Trustees. “As a trustee, Fred is instrumental in advancing the NOLS mission,” John says. “In the boardroom, he rarely speaks first, but when he says something everyone listens. He is an amazing manager and leader.”

John adds that in addition to Fred's leadership gift to the NOLS International Base Camp Initiative, Fred has made other significant donations, and Wyndham Hotels and Resorts has generously hosted several NOLS events and meetings.

Fred's knack for balance is evident in his professional life, too. He recently led a remarkable Diversity Initiative at Wyndham International. Recognizing that “any organization that does not weave a culture of diversity

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### NOLS LEADERSHIP QUOTE



“While we were growing up, my parents clearly conveyed to my siblings and me the message that philanthropy is an essential part of living in the world, and, in particular, contributing to organizations you truly believe in. I chose to include NOLS in my will because it was as important a learning experience as the school I attended for 13 years—which is also in my will. When I created my first will, I knew certain organizations would ALWAYS stay in my plan. Those were the ones I put in first.”

Lee Warner, shown here in her 1982 student photo, is a NOLS graduate, a long-time, regular donor to the NOLS Annual Fund and a member of the NOLS Summit Team. She and other NOLS grads in Maine are working together to establish a NOLS alumni organization there. A profile is on page 2.

## SUMMIT TEAM PROFILE

### Lee Warner

By SUSAN BRAME

"I feel very fortunate to have grown up in a family that was philanthropically oriented," observes NOLS grad Lee Warner. "My parents both role modeled the importance of giving time and money to organizations we value. That is a lesson I want my daughters to grow up with, too."

Lee attended a Wind River Wilderness course in 1982, when she was a sophomore at St. Lawrence University. Like every NOLS grad, her memories include a collage of images. "My course was in June, so the rivers were all swollen with snowmelt—crossings required real teamwork," she recalls. "And I was terrible at catching fish, though I did catch a trout—once."

"My NOLS course was an incredible, transformative experience," Lee continues. "I was an athlete, so I thought the physical demands would not be particularly challenging. I quickly learned that when they said 'long hikes and a heavy pack,' they weren't kidding. The course completely changed the personal yardstick with which I measure what I can do and accomplish. It was during that month in the mountains that I built a foundation of self-confidence that launched me into a successful, 20-year career in the technology field."

While pregnant with her second baby, Lee embarked on a new expedition—that of the full-time, stay-at-home Mom. "I had a great career, but I haven't looked back once since I made the decision to 'retire' and stay home with my children." She and her husband, Hans Warner, look forward to sharing the things they treasure with daughters Chase and Morgan, including time in the outdoors and the satisfaction of making a difference in the world.

*Lee is a member of the NOLS Summit Team, a recognition society for donors who include the school in their estate plans or establish some other deferred gift to NOLS. If NOLS is in your will, please let us know (800.332.4280 or giving.nols.edu).*



*Lee Warner and daughter Chase*

# Create a Legacy for

## Your Will and Your Charitable Interests

**F**orty years ago Americans had the foresight to legislate wilderness protection through the 1964 Wilderness Act. NOLS founder Paul Petzoldt testified before Congress on behalf of the Act, and it is no coincidence that he started his school the next year to teach wilderness skills and develop outdoor leaders.

Nearly four decades later, NOLS remains true to its mission and dedicated to providing the world's highest quality wilderness education. The NOLS community generously supports that mission every year, but have you considered what you might do after your lifetime?

You can create a legacy that will have a profound, lasting impact on future generations of NOLS students.

If you die without a will, the state will make decisions about how to disburse your assets. And let's face it, the state is unlikely to know your intentions for the people you love or the organizations you value. So if you don't have a will, now is a good time to create one.

If you do have a will, does it reflect your values and intentions? It is easy to add a charitable bequest to an existing will.

### *The Benefits of Giving*

Federal tax law permits a 100 percent charitable deduction when you make a bequest to NOLS in your will. Of course, tax savings are not the only advantage—it's gratifying to know that you are creating a legacy to support wilderness education.

The following information might serve as a guide in considering a gift.

**Unrestricted Bequests** allow you to designate a specific sum or percentage of your estate, or to designate a piece of property for NOLS. You can even give a specific sum of money that, when invested, provides annual gifts to NOLS on a permanent basis. If you make an unrestricted bequest, you give NOLS the discretion to decide where your gift is most needed.

**Gifts for a Specific Purpose** can be included in your will by naming NOLS and designating the purpose for which it is to be used. Personal property, such as a home or farm, is often designated as a specific gift. If you plan to restrict a bequest, please contact the school to be certain that NOLS can use the gift.

**Memorial Gifts** can be designated in your will with a specified amount or percentage of your estate to endow a memorial fund, in honor of a special person or loved one.

**Residuary Gifts** provide a way to make a gift once family and heirs are provided for in your will. You simply indicate that the rest, residue and remainder of your estate, both real and personal, are left to NOLS.

**Contingent Gifts** allow you to select your spouse or other(s) as the primary recipient(s) of your estate. If they do not survive you, then NOLS is the secondary beneficiary.

## VOLUNTEER OPPORTUNITIES

"On top of all the concrete skills we teach at NOLS," observes former NOLS Instructor Tommi Joseph, "one of the most powerful things I see our students come away with is a keen awareness of what it means to live an environmentally and globally conscious life. While we've made great strides in the diversity of our students, I would like us to continue to try to reach a wider, more diverse audience with that message."

In addition to a demanding career as a Child Life Specialist at Children's Hospital in Denver, Tommi donates much of her valuable after-work time to two

organizations that share these values. She currently serves on NOLS' volunteer Steering Committee, a group helping the school complete the International Base Camp Initiative. She's also a NOLS grad, former instructor and in-town employee, and was instrumental in forming the Front Range alumni group.

The other organization close to Tommi's heart is *cityWILD*, where she serves on the board. *cityWILD* is a young Denver non-profit whose mission is to provide Metro Denver youth with experiential and outdoor learning opportunities that promote personal

# Wilderness Education

## Tailor a Bequest To Generate Income

“It was during that month in the mountains that I built a foundation of self-confidence that launched me into a successful, 20-year career in the technology field.”

—Lee Warner, Summit Team member, NOLS Annual Fund donor

While you can establish any of the gifts described below during your lifetime, they also offer flexible estate planning tools. Each of these gifts provides unique advantages.

**A Charitable Remainder Unitrust**, created in your will, pays income to your survivors for their lifetimes or for a term of years. Because the trust qualifies as a charitable gift, it often saves estate taxes and therefore might provide a higher income for your heirs. When the trust terminates, NOLS receives the remainder.

**A Gift Annuity** provides expense-free management of property and a guaranteed, steady income for another person for life. Through an annuity contract, your will transfers assets to NOLS, and the school agrees to make periodic, fixed payments for the contract term. Because this gift saves estate tax and provides partly tax-free income, it often results in a higher return for your survivor.

**A Charitable Lead Trust**, created in your will, makes annual charitable contributions to NOLS for as many years as you like. The trust property then passes to children, grandchildren or other heirs—often with dramatic tax savings. You can safeguard your estate for your heirs while you support NOLS.



A group of NASA astronauts on a NOLS Professional Training course navigate through Wyoming's Wind River Range.

### Educate Tomorrow's Wilderness Leaders

“What NOLS does is important,” notes NOLS trustee and Summit Team member Doug Luke. “And it’s important that we, as donors, alumni and parents, do what we can to support that work and ensure the school’s viability for decades to come. Including NOLS in my estate plan was a natural step in my relationship with the school.”

There are many ways to make significant charitable contributions through your will while protecting and enhancing your own and your family’s financial situation. Thoughtful planning is the key.

To determine which type of gift is most appropriate, please contact us. We will be happy to answer your questions and provide more detailed information.

Education comes to life for NOLS Southwest student Diana Kienzler in Van Horne Cave, Southern Arizona.

empowerment, leadership and community participation.

“I like working with both NOLS and *cityWILD*, because of the

overlap in mission and the synergy between the two organizations,” notes Tommi. “*cityWILD* accomplishes important work here in Denver, and they send several strong scholarship students to NOLS every year—students who are successful at NOLS largely because of their background at *cityWILD*.”



NOLS volunteer Tommi Joseph



## The Noble's Turn

By DAVID C. COWLES

After reading NOLS' alumni publication, *The Leader*, NOLS grad Rob Bethge contacted the school about the International Base Camp Initiative—specifically about the school's plan to renovate the historic Noble Hotel. Rob has strong memories of winter evenings in front of the Noble Hotel fireplace between backcountry sections of his 1998 Semester in the Rockies. He wanted to lend a hand to help preserve those memories for himself and thousands of other alumni.

### Preserving our Past—With an Eye to the Future

The NOLS International Base Camp Initiative is a five-year, \$10 million campaign to update and expand the school's international campus in Lander. The first phase of the project—providing efficient space for NOLS' administration—is complete. The new headquarters has enabled NOLS staff to make huge improvements in the way they support NOLS courses around the globe.

Now it is the Noble Hotel's turn. The hotel is an integral part of the Lander campus, and the school is committed to preserving this piece of national, Western and NOLS history. Though NOLS recently invested funds to bring the building up to current safety codes, it remains in urgent need of renovation.

For Rob Bethge and hundreds of NOLS students every year, the Noble Hotel is an important part of their NOLS experience. After traveling to Lander from around the world, they find themselves in this historic Western building—writing letters in the lobby, swapping tales in front of the fireplace, or packing for their mountain expedition—much like wilderness adventurers did when the hotel first opened in 1918.

### Taking Action

Rob is not one to dally. In the '90s, he successfully navigated the 'dot.com' rise for six years as chief marketing officer of DaTek. After the company sold in 1998, Rob took some time off from work and came to NOLS. With similar decisiveness—after a couple of brief conversations this winter—Rob made a generous gift to the campaign, renewed his annual fund gift and initiated a conversation about adding NOLS to his estate plans.

"I knew at some point I would give to NOLS," says Rob. "And after reading the article about the Noble Hotel, I decided it was time. I felt that my gift would make an immediate difference for NOLS."



NOLS grad Rob Bethge

# Gifts At Work

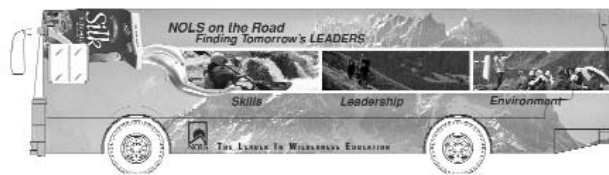
## NOLS On The Road

By ERICA KRUG

**T**hanks to a corporate sponsorship by Silk, the leading producer of organic soy milk, NOLS plans to unveil a new project this summer—*NOLS on the Road: Finding Tomorrow's Leaders*. A bus, covered with NOLS images and running on an engine converted to burn used vegetable oil, will start traveling the country. The bus will attend summer festivals at first and then visit high school and college campuses in the fall.

"For several years we have been playing around with ideas to have instructors meet more with prospective students, but didn't know how best to do that," says Bruce Palmer, NOLS Director of Admission and Marketing. "But last June, when the Middlebury students came through, the light bulb went on."

Palmer refers to a group of 13 students from Middlebury College in Vermont who drove a bus fueled by veggie oil across the country last summer, calling it Project Biobus. Inspired by their environmental message and impressed by the media interest that Project Biobus generated, NOLS began to look for a sponsor and to brainstorm ideas for its own cross-country trip.



Travis Campbell

*An initial design concept for the NOLS Biobus, which will tour the country spreading the word about NOLS and recruiting scholarship students.*

Peter Roy, Chair of the NOLS Board of Trustees, approached Silk, who agreed to be the corporate sponsor for the project. "Silk views this as a key component of their youth marketing program," Palmer says.

*NOLS on the Road: Finding Tomorrow's Leaders* will be staffed by a NOLS Instructor, a marketing representative and a driver. The bus will include a bouldering wall built into its side and a speleotour—a caving simulation—under the bus. It will also have a theater screen with power generated off the engine and some solar energy,

and computers so that people can apply for courses online from the bus. To incorporate NOLS' leadership theme, the project's organizers developed the theme of "finding tomorrow's leaders." *NOLS on the Road* staff will seek scholarship nominations from guidance counselors, deans and teachers, and the school will reserve 15 full-tuition scholarships for these nominees.

Palmer looks forward to the project. "It's going to be a great opportunity for folks to learn about NOLS, because it is interactive and it focuses on what makes NOLS special—leadership, outdoor skills and caring for the environment."

## FINESSE, FLEXIBILITY AND BALANCE

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into its system is not reacting to the reality of today," Fred works diligently to make Wyndham the highest-ranking hotel company for minority employees.

"Part of who we are is a reflection of our constituents," Fred says.

Fred envisions similar strides at NOLS. Among NOLS' strategic goals for 2007 is the mission to "fulfill our domestic diversity goals for students, staff and trustees." This objective, complemented by Fred's support, yields a promising outlook for diversity at NOLS.

At NOLS, Fred gained a new perspective on wilderness. "Before my trip, if someone had asked me to describe wilderness in a few words, I would've said, 'government land,'" Fred says. But

through his NOLS courses, Fred redefined wilderness as "my land; my home; I can go back whenever I want."

He continues, "My sole obligation to the continuity of this ownership is a commitment to leave the wilderness the way I find it."

Now outfitted with two kayaks, which the Kleisners keep in their "front yard" on Washington's Puget Sound, Fred is truly at home in the outdoors. His commitment to wilderness spans from personal affection to a resolve to teach others that "wilderness belongs to everyone." His contributions to NOLS form an immeasurable pillar of support in meeting that objective and are yet another manifestation of the balance and finesse that Fred transfers so gracefully from kayak to corporation.

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