

# 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 • JANUARY 2005

## A New Name for the Hotel Lobby

BY SARAH SMITH

**O**n an ordinary October afternoon in Lander, a crowd gathered among the elk antlers and antique wooden banisters of the legendary Noble Hotel lobby to hear the story of an extraordinary young man named Charley Brooks. There is no place more fitting to commemorate the life of such a charismatic student who continues to touch the lives of the NOLS family. For decades, this thoroughfare, now the Charley Brooks Memorial Lobby, has been the center of NOLS' campus and a niche for students to dream of their adventures before and after their course.



*Tony and Linda Brooks look over the banister of the Noble Hotel staircase, flanked by Charley's instructors from his 1990 Wind River Mountaineering course: Pete Absolon, John Kemp and Gary Wilmot.*

Charley Brooks first arrived in Lander on a June day in 1990, a 21-year-old from New York state with a climbing guide instead of a fiction book and a determination to maximize his experience. "During his course, he was always looking towards the next summit. He was incredibly motivated and as a result motivated others and raised the bar for the course," says Gary Wilmot, his instructor. "His strength certainly permeated the experience." Charley returned from NOLS a month later, but his spirit never left. His photo overlooking the Tetons was hung near the front desk shortly after his tragic death in September of that year.

In 1992, the Brooks family established an endowment to carry on Charley's spirit of adventure and love for wild places. The original Charles W.

Brooks Memorial Lobby this fall marks an important touchstone for NOLS. The leadership gift donated by the Brooks family marks the first completed memorial gift in the International Base Camp Initiative (IBCI) project. This significant contribution will allow for general renovation of the hotel lobby, expansion of the Charley Brooks Memorial and the continuance of Charley's legacy.

"We chose to support the Base Camp because we felt it was necessary to provide the infrastructure and support for the students of the coming years," explain Tony and Linda Brooks, Charley's parents. Additionally, we have continued to support the Charley Brooks Scholarship. We can see and appreciate the incredible impact it has had on so many students. NOLS is an organization that has created an environment and a chemistry where students can mature and realize their strengths and potential through a process of self-discovery. We are pleased to be able to be a part of this."

*Continues on page 4*

### NOLS LEADERSHIP QUOTE



**"The work and mission of NOLS are important. The ongoing Base Camp Initiative conveys a sense of permanence to the NOLS mission, and I'm pleased to contribute to the initiative as a donor and volunteer. When completed, the base camp will be a noteworthy cornerstone for Lander and for NOLS, but more importantly, it will allow us to better serve our students and alumni."**

*Doug Luke, a NOLS parent, has been volunteering for NOLS since 1994. A member of the school's board of trustees since 2000, Doug took his first NOLS course—horsepacking in Wyoming's Wind River Mountains—in 2002. He is president and chief executive officer of HL Capital, Inc., a personal investment business in New York.*

## SUMMIT TEAM PROFILE

BY CINDY CAREY

### Cameale Johnson

"People came out of the woodwork to help me afford the Mt. McKinley climb," says NOLS Summit Team member Cameale Johnson. "With their assistance, the choice to do the climb became one of personal growth instead of finances." The year was 1984 and Cameale had been asked to join an expedition to Mt. McKinley, North America's highest mountain, by a fellow co-worker. The expedition was unlike anything else she'd ever done. An active pharmaceutical doctor, her adventures had been primarily cross-cultural to assist the disadvantaged around the world. A few months after she was invited, Cameale was standing on the summit of Mt. McKinley. For Cameale, the experience was transformational.

Five years after her life-changing experience, Cameale began researching possible organizations to benefit from her estate. She looked into several local organizations but they didn't meet her criteria. Her goal was to find an outdoor organization that provided expedition experiences and had an established scholarship program. Though not a NOLS grad, Cameale stumbled upon the school through continued research.

In early 2000, Cameale contacted NOLS to find out more about the school and the programs we offered. NOLS was a perfect fit. "I wanted to allow individuals to have outdoor experiences who without assistance would otherwise not be able to do so. NOLS had the systems in place that made it easy for me to use my estate in a way that I wanted."

Through her bequest and the NOLS scholarship program, Cameale will someday help students experience the outdoors and have life-changing experiences like hers.

*Cameale 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](http://giving.nols.edu)).*



*Summit Team Member  
Cameale Johnson*

# Reap the Benefits of

Do you have highly appreciated assets—such as stocks or real estate—that pay little or no income? Perhaps you'd like to diversify some assets, but would face high capital gains tax penalties upon the sale of some long-term property. Or maybe you've maxed out employer and government retirement savings programs, but would like to set aside more for your eventual retirement?

## Charitable Remainder Trusts

If you can answer 'yes' to any of these questions, and if you're committed to supporting wilderness and leadership education, you might want to consider a charitable remainder trust.

There are two principal categories of charitable remainder trusts—charitable remainder annuity trusts and charitable remainder unitrusts. In this issue, we'll focus on the latter. Charitable remainder unitrusts are among the most flexible charitable gift vehicles, and they offer some of the most significant benefits that the IRS still allows individuals.

### How Unitrusts Work

To establish a unitrust, you transfer cash, land or other assets to a trust for the future benefit of NOLS. You select a trustee to pay you a specific rate of return times the annual value of the trust assets. The unitrust is revalued every year, and any income over the set payout is reinvested. Therefore the value of the trust and future income payments are expected to increase over time.

The payouts continue on a set schedule for your lifetime or a specified term of years. The unitrust can pay income to multiple beneficiaries, for lifetime or for a term of up to 20 years. At the conclusion of the trust term, the asset provides a wonderful gift for NOLS.

### Avoid the Capital Gains Trap

The trust can accept many forms of assets. A unitrust can be structured to accept assets that are temporarily illiquid—such as real estate or a family

business. Since no capital gains tax is applied to the sale of the asset after it is transferred to the trust, the entire value of that asset can be put to work—or sold and reinvested to produce a higher income.

### Additional Retirement or Saving for College

If future income is your goal—to pay for college, send family members to NOLS, or increase your retirement income—you can establish a unitrust to help achieve that goal. The unitrust can invest solely for growth for a term of years, and then convert an appreciated portfolio to assets that yield higher income—with no capital gains costs.

During the growth years, you may choose to gift your income from the trust back into the principal, thereby further increasing both the future income and the eventual gift to NOLS. This type of unitrust is a great way to bolster future income while also making a substantial gift to NOLS.

### Save Income Taxes Now

In addition to all these benefits, you receive an immediate income tax deduction in the year you establish a charitable remainder trust. The deduction is based on the full fair market value of the gift, reduced by the present value of your future income from the trust.

Of course, the best reason to support NOLS has nothing whatever to do with taxes. You can find that "best reason" in the face of every recent NOLS graduate.

## VOLUNTEER OPPORTUNITIES

BY RICH BRAME

Since 1998, NOLS has had reunions, events, and seminars in the Boston area that have reached over 800 people. This doesn't happen by accident; it's due to the efforts of a committed group of NOLS alumni—a group that eventually became the NOLS Boston Alumni Chapter.

The Boston Alumni Chapter has found that offering day hikes, seasonal sea kayaking events, climbing nights, occasional group volunteer work, yearly reunions and occasional social and organizational meetings seems to interest the area's 2200 plus NOLS alumni.

Wind River Wilderness course graduate (1998) Janet Bertucci has been in the thick of the Boston Chapter's organization since 2002. She's motivated

to volunteer for several reasons—she likes the challenge of organizing events, she enjoys working with the quality folks who are the local alumni, and she likes meeting people in the city who make great outdoor adventure partners. But mostly, Janet gives her time and creativity to expand the opportunities and impacts of a NOLS expedition—so that others can have the type of educational adventure she had in Wyoming's Wind River Mountains six years ago.

"Making connections with graduates in the Boston area has been a great way for me to continue to enjoy the outdoors with folks who have also been deeply influenced by a NOLS experience, and to give back to the school by helping to extend its reach," says Janet.

# Well-planned Philanthropy

## A Remainder Trust at Work

“Aside from the fact that it made sense financially, this was an opportunity to do some good for society, for the environment, and for those who love the outdoors.”

-Al Chisholm

NOLS graduate Al Chisholm is part of an extended ‘NOLS family.’ He is married to Dr. Mary Annarella, and their daughter Sarah Annarella graduated from a NOLS Semester in the Southwest in 1990 and has been a NOLS Instructor since 1999. Al first came to NOLS on a Whitewater River Expedition course in 2001.

When Al and his business partner sold their software company to Emerson Electric, he received a block of Emerson Stock as a result. As good a company as Emerson is, Al did not want to have all his financial eggs in one basket, but his options for diversifying were limited. A charitable remainder trust provided a great vehicle for diversifying part of this amount without incurring substantial capital gains taxes up-front. In fact, it generated a substantial one-time tax deduction.

The trust now has a diversified portfolio equal to the full amount of the contribution rather than the after-tax amount it would have contained if Al had sold the stock himself and reinvested the proceeds. The trust provides income for a predetermined number of years after which the remainder goes to one or more designated charities.

“I attribute my good fortune to luck as much as to hard work,” says Al. “I was incredibly lucky to be born smart, to have the opportunity for a good education, to be in the right place at the right time with the right people. Aside from the fact that it made sense financially, this was an opportunity to do some good for society, for the environment, and for those who love the outdoors.”



*NOLS grad and parent Al Chisholm, shown here on the 2002 NOLS Alumni Sailing trip in Baja, met some of his financial and philanthropic goals in a recent charitable remainder trust.*

“By the way,” notes Al, “here is a helpful hint: when you set up the trust you need to indicate a date each year when its value is determined. You generally want to specify the ‘last trading day of the year,’ not the ‘last day of the year.’ Your accountant will thank you.”

Al returns to NOLS most years for an Alumni trip. “Getting back into the outdoors is one of the high points of the year for me,” says Al. During his “spare” time these days he is working on another software startup company.



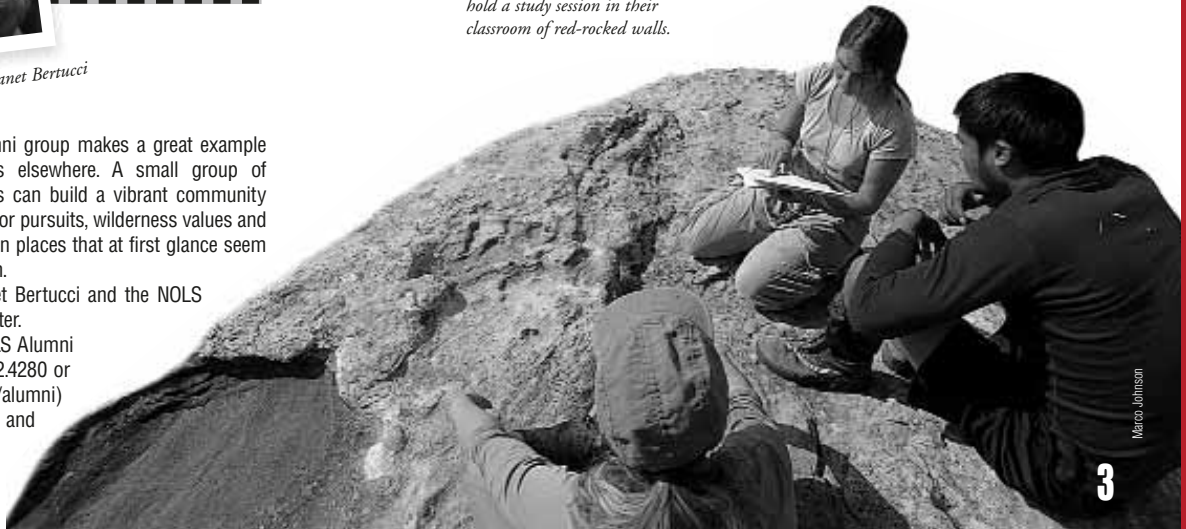
*Boston area NOLS grad Janet Bertucci*

The Boston alumni group makes a great example for NOLS graduates elsewhere. A small group of committed graduates can build a vibrant community around shared outdoor pursuits, wilderness values and camaraderie—even in places that at first glance seem far from NOLS’ reach.

Hats off to Janet Bertucci and the NOLS Boston Alumni Chapter.

Contact the NOLS Alumni Department (800.332.4280 or <http://www.nols.edu/alumni>) for more information and ideas on networking with graduates in your area.

*Semester in the Rockies students hold a study session in their classroom of red-rocked walls.*



*Marco Johnson*

## A Family Effort

By DAVID COWLES

When Henry Simonds got the call from his brother, Dylan, about supporting NOLS' International Base Camp Initiative in a joint pledge, he immediately liked the idea. "It sounded like a great way to show our support for a program we believe in and to have a greater impact by joining together with our pledge," remembers Henry. Dylan's next call was to his cousin, Brooks Fisher, and he got the same enthusiastic response. Brooks sees the joint pledge as a clever way to show support, given the fact that their extended family includes so many NOLS grads, each of whom views their NOLS experience as significant.

And there were still more phone calls to make—by the time Dylan finished calling, five cousins in the Simonds and

**"When NOLS said 'We need your help here,' the family responded unanimously. It is a perfect time to designate NOLS as a priority."**

Fisher families—all NOLS grads from the late 80s and early 90s—had joined forces to pledge \$25,000 to the Base Camp campaign. Matthew Fisher and Talbott Simonds were equally excited to get involved. "Everyone of us has our personal funding priorities," explains Dylan, "but when NOLS said 'We need your help here,' the family responded unanimously. It is a perfect time to designate NOLS as a priority."

"Whenever you have an experience that changes you, you begin to look for ways to give back so that others can have the same experience," says Brooks. "In business, growth often means diminished quality and service. As NOLS grows, this gift will help build infrastructure and enhance the high quality and support we remember from our courses."

The Simonds and Fisher cousins were looking to make an impact, and they have. Their combined gift to the International Base Camp Initiative, earmarked to name the Public Policy office in the Lander headquarters building, creates a lasting legacy to NOLS' environmental focus and to the NOLS experience they all share.

# Gifts At Work

## Sowing Seeds of Change

By ANNIE DALLAS

Sometimes the slightest ripple triggers a magnificent interruption of the ordinary. This notion is something that NOLS students grasp well as they strive to leave no trace in the wilderness. But when transferred from the wilderness to an active, civilized mind, the notion of leaving a trace can become powerful and positive.

Each year, NOLS scholarships help activate young minds to reach beyond perceived limits and make impacts—whether in their own lives, in their community or even globally.

One such leader of tomorrow is 17-year-old Nhial (Simon) Malia, who joined the NOLS community last summer on a Wind River Wilderness course. Born into a perpetual war zone in South Sudan, Simon came to the United States at age 11 and won a scholarship to The Chinquapin School in Highlands, Texas.

Simon's NOLS course was not the first time he experienced an outdoor classroom, but the previous circumstances were much different. Ousted from the school system because of their religion, children of

South Sudan attended class under a tree where lessons were written on the ground. While this scene will forever remain imprinted in Simon's memory, his NOLS course infused him with a new sense of an outdoor classroom—one fashioned of freedom and hope rather than oppression.

On his NOLS course last summer, Simon says he "gained knowledge that will be crucial to [his] life"—a life he says he will dedicate to becoming a "seed of change."

"It only takes one seed to become a tree," Simon says. "I want to become the seed of liberation. I want to deliver my people out of suffering and pain. I want to reach out to them and give them hope and high expectation, and also become their voice."

Education, Simon says, will form the cornerstone of his societal contribution. And for this task, financial help is a necessity.

Simon emits remarkable fervor and determination to fulfill a courageous and arduous calling. NOLS has the privilege of cultivating innumerable seeds of change, just like Simon. It takes scholarships, available only through the generosity of others, to catalyze this influential evolution.



*Nhial (Simon) Malia, born in South Sudan, took a Wind River Wilderness course last summer.*

## A new name for the hotel lobby... Continued

A prosperous student during his month in the Winds, Charley Brooks set the precedent for what a true leader should be. "Charley was a man of few words, but his voice certainly did carry when he spoke," says another of his

instructors, Pete Absolon. "He led by example and really stood out because of his ability to help his fellow students."

In a quiet way that is unmistakably Charley, his memorial continues to inspire passing students to seize every day. John Gans, executive director at NOLS says, "In thinking about Charley and the relationship that the Brooks family has had with NOLS, I can think of no better person to guide our students into the mountains and welcome them home after a month in the wilderness than Charley Brooks."



*Charlie Brooks on his 1990 NOLS course.*

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