



A P U B L I C A T I O N O F T H E N O L S D E V E L O P M E N T O F F I C E

FRIENDS

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

SUPPORTING EXCELLENCE AT NOLS • SEPTEMBER 2005

Exploring New Levels of Commitment to NOLS

New Donor Group Propels NOLS Past the \$6 Million Mark

BY SUSAN BRAME

An explorer is someone who travels to places previously unknown or never before navigated. The NOLS Explorers—a small group of generous supporters—are charting exciting new philanthropic territory and inspiring others within the NOLS community to reach their potential.

The NOLS Explorers, established to recognize exemplary leadership and generosity, coalesced last spring when Gene and Susie Tremblay decided to double their Base Camp campaign gift and challenged others to join them. There are now six charter members of the NOLS Explorers, all of whom hope the group will continue to inspire and challenge other donors.

Leading by Philanthropic Example

“By issuing this challenge, Gene is encouraging others to step up and follow his example,” says campaign co-chair Frank Pisch. “NOLS is all about leadership. Whether it’s in wilderness expeditioning or risk management, or, in this case, setting a philanthropic example—leadership is ingrained in the culture of NOLS. These six founding members of the NOLS Explorers are generously providing for the future of NOLS and setting an example for others to follow.”



NOLS Explorer Fox Benton shows off his catch in Montana's Madison River.

The Tremblays considered long and hard before deciding to commit to NOLS at this level. “This gift to the NOLS Base Camp Initiative is the largest contribution our family has ever made,” says Gene. “It seemed too big a stretch at first, but then I considered what else we might do with the money. There are always competing demands—other worthwhile organizations, kids and parents to take care of, things we want to own or places we want to go. But when you look back, only a few of those stand out as lasting and important.”

“After Susie and I decided we would make this commitment to NOLS, we challenged others to come and explore the outer reaches of their own commitment to the school,” explains Gene. “It’s exciting, because this small group can break the logjam on getting the Noble Hotel renovated and completing the Base Camp Initiative.”

Rising to the Challenge

Greg and Anne Avis, both NOLS graduates, responded readily to the challenge. “It’s time for us to wrap up this campaign,” agrees Greg, who also serves on the board of trustees.

“Completion of the Lander Base Camp will mark an

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“We want to help ensure that future generations will have the opportunity to benefit from the NOLS experience at its finest.”

Fox Benton, NOLS Explorer and Trustee

NOLS LEADERSHIP QUOTE



“At my age, I don’t need more things. Relationships are what matter—relationships with people I care about and with an organization like NOLS that is working hard toward a mission I value. I hope the NOLS Explorers will continue to play a valuable role in supporting that mission.”

Gene Tremblay, a NOLS graduate and former chair of the board of trustees, is inspiring others to join him in exploring higher levels of commitment to NOLS. He and his wife, Susie, recently helped establish the NOLS Explorers, a group of NOLS supporters that is setting new standards of giving at the school.

SUMMIT TEAM PROFILE

Steve Kral—Sharing the Adventures

BY CINDY CAREY

An avid reader of mountaineering stories, Steve Kral longed to learn the skills necessary to travel confidently in the backcountry. When he learned of NOLS he knew right away that he wanted to take the Alaska Glacier Mountaineering course, which he completed in June 1997.

Steve credits his instructors with giving him the confidence to head into the backcountry on his own. “While I may not have retained all the technical skills taught during the course, I learned to navigate and travel safely in the backcountry,” says Steve. “More importantly, I learned how to assess risk and know my limits.”

Subsequently, Steve has hiked the Pacific Crest Trail, explored the mountains of Peru and New Zealand, and climbed Gannett Peak, Mount Shasta, Mount Adams, and several other smaller volcanoes in the Cascades. “Climbing Adams was particularly gratifying,” he says, “because C.E. Rusk’s *Tales of a Western Mountaineer* played a huge role in motivating me to learn about the backcountry.” These experiences and a desire to be more philanthropic led Steve to give something back to NOLS.

So that others might have similar learning opportunities, Steve made NOLS a beneficiary of his IRA. “It seemed like a natural balance, leaving something for my niece and nephew and a gift to NOLS.” Ultimately, Steve’s goal is to endow a NOLS scholarship.

Of his experience setting up the bequest, Steve says: “NOLS made it easy. I was pleased to learn that NOLS staff are as efficient and helpful in the office as they are in the field!”

Steve is a member of the NOLS Summit Team, a recognition society for donors who include the school in their estate or other long-term giving plans. If NOLS is in your will, please let us know (800.332.4280 or development@nols.edu).

Retirement Planning: Provide for Your Family,

You work hard during your earning years and want to secure financial well-being for yourself and your family during your retirement. Interestingly, charitable donations often complement thoughtful retirement planning.

Donate from Your Retirement Fund “Pocket”

For example, retirement plan assets often provide a handy pocket from which to make charitable gifts—both current gifts and future bequests. If left in an estate, retirement plan assets are often subject to high tax rates—sometimes in the 60 to 70 percent range—resulting in an unplanned “gift” to the federal government. State taxes can add even more, further diminishing the eventual value of the assets.

With careful planning, you can control the disposition of your pension plan assets, increase your family’s inheritance, and make a generous gift to NOLS instead of to the government.

Avoid Double Taxation by Funding a Bequest with Retirement Assets

Because contributions to qualified plans are often made with “before-tax” dollars, those assets are subject to taxation when they are withdrawn. Many couples and individuals defer receiving income from pension plans until they reach the mandatory age of 70.5, and then they take only the minimum distribution. Thus the plan

continues to grow, and when it is passed down to heirs it can be subject to “double taxation” or a double whammy of estate and income taxes.

Rather than make an unintended donation to the federal government, you can use retirement assets to fund charitable donations. There are a couple of ways to accomplish this—you can name NOLS as a beneficiary of your IRA, or you might use your retirement assets to establish a charitable remainder trust. The trust pays income to your beneficiary for his or her life or a term of years and eventually funds an important gift to NOLS.

This plan might very well produce the pleasant result of your heirs receiving more than if retirement assets were left directly to family and charitable bequests were made from other assets in your estate. It allows you to protect your retirement assets and your children’s inheritance from excessive taxation. And you’ll make a big difference for NOLS students around the world.

Use Your Retirement Assets for Current Gifts

If you are 59.5 or older, you can also make tax-smart current donations from your IRA. For NOLS trustee Doug Luke, this strategy makes good sense. “Like a lot of other people,” explains Doug, “I’ve built up a pretty substantial IRA, and I’m in the fortunate position of not needing to rely on that money for my retirement income. I won’t start taking the money out until I have to, but when I do, I’ll pay ordinary income tax of



Summit Team member Steve Kral in Peru’s Cordillera Blanca



Shaping a Northwest Idaho NOLS Community

BY GARY WILMOT

Vision and action are cornerstones of the NOLS leadership curriculum. NOLS graduate Jane Timberlake and her husband, former NOLS Instructor Taylor Walker, continue to model this leadership

trait long after their field experiences. Taylor is in the real estate business, and Jane is a graphic designer. Their daughter Zoe is a budding hiker who keeps them both busy on the mountain trails surrounding the Wood River Valley in Idaho.



NOLS graduates and supporters Jane Timberlake and Taylor Walker, with their daughter Zoe

As volunteers for NOLS, Taylor and Jane recognized the need in their area for community building with the aim of supporting recruitment efforts and creating awareness for NOLS fundraising priorities.

Their vision is to reconnect local alumni and parents with NOLS and to help generate support for the school. “Jane and I recognize that for us, life after NOLS got complicated with the demands of work and family,” says Taylor. “While we no longer have time to do trips with NOLS, we want to stay involved and participate in a meaningful way. Our vision is to host some fun events that allow folks to connect with others who have a passion for NOLS. By doing so we’re able to meet others in the community with similar interests, while introducing NOLS to folks who might be able to help the school now and in the future. For us, the events have been great fun and have led to lasting relationships with people in our local community.”

In the late '90s, Taylor and Jane were instrumental in helping NOLS complete an endowed scholarship fund. More recently, they’ve been working to foster awareness of the NOLS Annual Fund and International Base Camp Initiative. By helping generate support for scholarships and critical facility needs, volunteers like Jane and Taylor are positioning NOLS for a bright and productive future.

Secure Your Future, and Make a Gift to NOLS



NOLS trustee Doug Luke uses his IRA for tax-smart charitable gifts.

about 50 percent on any withdrawals.”

“It’s far more practical for me to use that money to fund charitable gifts than to use appreciated securities,” he continues. “So when I’m doing my annual budgeting, I decide what my philanthropic budget is for the year. Then I take that money out of my IRA and put it in a special account. The money is

taxable when I take it out of the account, but when I make the gift it is fully tax-deductible, so it’s a wash.”

“Now that the highest long-term capital gains tax rate is 15 percent, it makes even more sense for me to use these IRA assets for making charitable donations,” concludes Doug. “Basically, I can make the same donation at a lower net cost.”

Looking to Boost Your Future Retirement Income?

In addition to using existing retirement plans as a convenient, tax-smart “pocket” from which to make charitable donations, some types of gifts can be structured to augment your future retirement income and establish a future donation to NOLS.

You can establish a charitable unitrust that maximizes future income rather than focusing on

current needs. With a charitable retirement unitrust, you can build future retirement income, save taxes, and eventually make a meaningful gift to NOLS.

For example, you might establish this unitrust 10 to 15 years before you retire. To do so, you transfer cash, stocks, land or other assets to a trust. The goal during these pre-retirement years is to invest for maximum growth. Regardless of what assets you use to fund the trust, the trustee (whom you designate) can sell those assets and reinvest for maximum growth. You pay no capital gains tax on the sale once the property has been transferred to the trust.

While you are still working, you can continue to add to the trust. After you retire, the unitrust assets are sold and reinvested again to yield maximum income—again without incurring capital gains taxes. Thus the trust will provide you with additional retirement income.

One of the most appealing features of this type of charitable gift is its flexibility. You select the amount you put in the plan each year, the trustee, the date when you retire, and how much income you, or you and your spouse, will receive.

Eventually the trust assets pass to NOLS as a donation, enabling the school to continue its important work teaching wilderness skills and leadership to people around the world.

Please contact the NOLS development office for more information on these or any other charitable gift planning ideas.



Sponsored Bus, Donated Car Extend NOLS' Reach

By JAMES MOSHIER



Brad Christenson

The NOLS Bus is taking the school's curriculum on the road all over North America.

Every year, thousands of individuals and organizations support NOLS' work—that support comes in all shapes and sizes. Perhaps the most visible and unique example right now is the NOLS Bus. For the last two years, Silk, the maker of organic soy products, has sponsored the NOLS on the Road Bus Tour. Powered by recycled vegetable oil and solar power, the NOLS Bus program includes a climbing wall, fly fishing demonstrations, wilderness medicine and leadership instruction. The NOLS Bus tours the nation spreading the word about NOLS, the courses we offer and the NOLS mission. Alumni and potential students

are drawn to the bus at each venue, and folks can download scholarship applications right there on the bus computers.

"We are thrilled to sponsor the NOLS Bus and support the school's important mission of training tomorrow's leaders with an environmental point of view," states Scott Stevens, VP of marketing for Silk Soymilk. "We value our partnership with NOLS and salute their message, because it underscores Silk's commitment to promoting renewable energy."

Last year, the Fremont Motor Company of Lander, Wyoming furthered the bus project by donating the use of a Dodge mini-van for the bus staff's use. The use of the van increased bus staffers' flexibility and helped them maximize their effectiveness at every stop.

The Fremont Motor Company has a long history with NOLS and its employees—going back 40 years to the school's first summer in Wyoming. Today, many vehicles in the NOLS fleet are still from Fremont Motors. Founded in Lander in 1938, Fremont Motor Company is another native Wyoming company. "We are very happy to help NOLS and to promote what they do for Wyoming," says Fremont Motors advertising director Darwin Damin.

NOLS Explorers *continued from page 1*

important milestone for NOLS—and provide firm footing from which the board and staff can creatively lead the school and work toward our mission."

One of the school's newest trustees and no stranger to philanthropic challenges, Fox Benton, with his wife Monica Benton, is another who joins the first rank of Explorers. Fox and Monica, who met on their 1995 Mountaineering course in the Pacific Northwest, have been active members of the NOLS Advisory Council for years and recently issued their own successful challenge to the council to increase its cumulative gift to the Base Camp Initiative.

"We're thrilled to join the other Explorers in providing additional momentum to the Base Camp Initiative. This initiative will provide the

infrastructure needed for continued program excellence," says Fox. "NOLS enriches lives in profound ways and is the best at teaching leadership and wilderness skills. We want to help ensure that future generations will have the opportunity to benefit from the NOLS experience at its finest."

Envisioning a Strong Future for NOLS

The NOLS Explorers are indeed traveling to places previously unknown and never before navigated. Though the NOLS community contains an abundance of leaders, adventurers, and explorers—in nearly every conceivable field and endeavor—these few stand out and are creating a new philanthropic benchmark for others to attain.

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Support NOLS by Donating, Loaning or Buying Unusual Items

By RICH BRAME

What do a full-body pile suit, a week in an Adirondack cabin, pictures of Paul Petzoldt, a hand-made beaded bracelet and a brand new expedition tent have in common?

All of these items (and others) have been donated to NOLS for our October 7-8 40th Anniversary Silent Auction. Proceeds go toward remodeling the Noble Hotel mezzanine—the location of Paul Petzoldt's office during the 1970s. We'll provide web access to the auction, too—stay tuned to www.nols.edu/alumni for details.

Supporters of NOLS are probably familiar with various types of donations; cash, securities and pledges readily come to mind. However, other kinds of donated property or services can also help NOLS reach more people in more ways.

From artwork to vehicles to aging computers, the IRS allows taxpayers to donate property to qualified non-profits—and to receive a deduction for the gift at the time of contribution.

So dust off useable or saleable furniture, artwork, computers or vehicles and consider donating it to NOLS. We might be able to auction your item during the October 7-8 Anniversary in Lander. You can also score some great stuff, too—place your bid and beat others to the punch—all for a good cause. Joining the 40th Anniversary Silent Auction is a fun and unusual way to make a big difference at NOLS.



Erik Schmidt

NOLS students around the world will benefit from a stronger international base camp in Lander, Wyoming.



International Base Camp Initiative

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A campaign to update and strengthen the International Headquarters of the National Outdoor Leadership School in Lander, Wyoming through renovation and new construction.

Former NOLS Instructors Support the Noble Hotel

BY GARY WILMOT

Teaching NOLS students to stay warm and dry in the wilderness is a theme that permeates every course. In keeping with that theme, former NOLS Instructors are organizing to raise funds to replace the heating system and the roof in the Noble Hotel. By doing their part to assist with Noble renovations through the International Base Camp Initiative, former field staff are investing in the future of NOLS and preserving a critical element of the Lander, Wyoming experience for future staff and students.

Tommi McHugh, a NOLS Instructor from 1993 to 1998, and the chair of the Former Instructor Campaign, sees it this way: "The Noble is a place I spent more time than I can remember over the years. I planned courses from my dorm room, laughed while hanging out with friends, researched a ton of NOLS classes and learned how to use email in the staff library. I planned personal expeditions and met some of my favorite

people while hanging out in the Noble lobby. I met new students, ate some great food, celebrated successful courses and spent time resting up so that I could get ready to do it all over again.

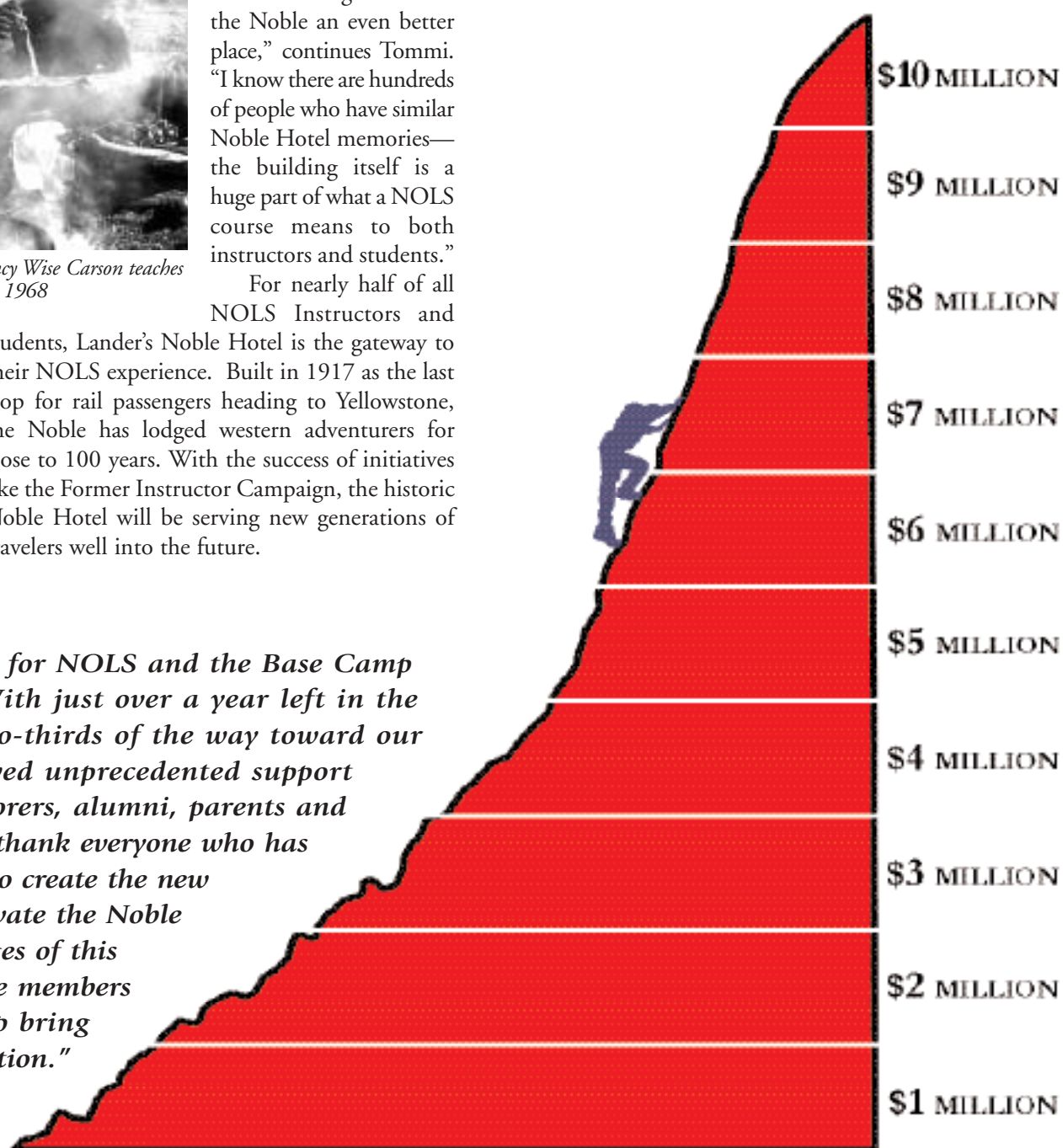


Former NOLS Instructor Nancy Wise Carson teaches a backcountry cooking class in 1968

"Because of all these memories I am really excited to be part of the team working to make the Noble an even better place," continues Tommi. "I know there are hundreds of people who have similar Noble Hotel memories—the building itself is a huge part of what a NOLS course means to both instructors and students."

For nearly half of all NOLS Instructors and students, Lander's Noble Hotel is the gateway to their NOLS experience. Built in 1917 as the last stop for rail passengers heading to Yellowstone, the Noble has lodged western adventurers for close to 100 years. With the success of initiatives like the Former Instructor Campaign, the historic Noble Hotel will be serving new generations of travelers well into the future.

CAMPAIGN PROGRESS SEPTEMBER 2005



"This is a great time for NOLS and the Base Camp capital campaign. With just over a year left in the campaign we are two-thirds of the way toward our goal. We have received unprecedented support from the NOLS Explorers, alumni, parents and friends. We want to thank everyone who has

already helped this important effort to create the new international headquarters and renovate the Noble Hotel. As we head into the final stages of this initiative, we'd like to see many more members of the NOLS family join in and help bring this campaign to a successful completion."

*Frank Pisch and Kurt Petersen
Campaign Co-Chairs*

Tap Tapley Archive Gallery Funded by Matching Gift

BY SUSAN BRAME

When Tap Tapley agreed to help Paul Petzoldt start a wilderness school in the foothills of Wyoming's Wind River Mountains in 1965, he knew they were on to something new and exciting. Tapley and Petzoldt already had a long history; as chief instructor for the first U.S. Outward Bound School in Marble, Colorado, Tap hired Paul to help with mountaineering there. He knew Paul from their time together in the 10th Mountain Division. Forty years later, Tap remains a legend in wilderness education circles and a larger-than-life figure within the NOLS community.



Tap Tapley and Terry Retzloff (center), with her daughters Bianca (left) and Eileen, a 2001 NOLS Semester in Kenya grad.

Anita Stadler

"First is the respect and admiration we have for Tap," he says. "I think it's great that NOLS wants to honor him in this way. Secondly, my daughter had a life-changing experience on her NOLS semester, and the more I get to know the organization and the people at NOLS, the more convinced I become that giving to NOLS is a worthwhile investment. And, finally, we wanted to structure our gift as a challenge to stimulate other people to give."

The Noble Hotel renovation is on track to begin this fall. Thanks to the

generosity and leadership of the Retzloffs—and the other NOLS donors who participated in the matching gift challenge—the Tap Tapley Archive Gallery will occupy a prominent space in the refurbished Hotel.

To honor his contribution to the school, NOLS is including an archive gallery in the renovation plans for the historic Noble Hotel. The Tap Tapley Archive Gallery, located immediately inside the Main Street entrance on the first floor, will highlight the history of both NOLS and the Noble Hotel. Exhibits will feature the contributions of early pioneers like Tapley and Petzoldt, as well as many of the school's milestones from the first four decades of its history.

NOLS parents Mark and Terry Retzloff were connected to the NOLS community—albeit indirectly—long before their daughter, Eileen, took a NOLS course in 2001. Terry's sister, Anita, is Tap Tapley's wife. So when they were approached to make a gift to the Base Camp campaign, this naming opportunity stood out as an obvious fit. "Several things combined to encourage us to say 'yes' to this gift," explains Mark.



A new NOLS archive gallery will be named for Tap Tapley, shown here in 1966 teaching NOLS students how to clean fish in the backcountry.



"The wilderness is our classroom, but students at NOLS Rocky Mountain begin and end their expedition in Lander's Noble Hotel. The Base Camp campaign will fund a much-needed renovation of this century-old hotel—ensuring that our learning expeditions get off to a great start and a fulfilling finish. This home stretch of the campaign is pivotal for meeting our students' needs and pursuing our educational mission for coming decades."

John Gans
NOLS Executive Director



"NOLS is the leader in wilderness education because we constantly seek to excel in all that we do. The Base Camp campaign is no exception. It is a bold initiative—raising more money than we've ever raised to build an integrated Lander campus. I'm confident that just as with everything else that NOLS sets out to accomplish, this will be a successfully executed team effort. Next year we will be celebrating not only a successful campaign but the completion of our campus."

Fred Kleisner
Chair, NOLS Board of Trustees

International Base Camp Initiative Steering Committee

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CONTACT US: FOR MORE INFORMATION OR TO MAKE A GIFT TO THE NOLS INTERNATIONAL BASE CAMP INITIATIVE, PLEASE CONTACT PIP COE, ALUMNI AND DEVELOPMENT DIRECTOR, 307.335.2275, 800.332.4280, PIP_COE@NOLS.EDU

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