



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.

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## New Leadership at NOLS

### *Michael Schmertzler Brings Passion and Commitment As Next Chair of the NOLS Board of Trustees*

BY NICOLE CHILTON

For many people who volunteer their time and expertise with NOLS, finding out how they came to be involved with the school can sometimes be a long story. For Michael Schmertzler, the newly elected chair of the NOLS Board of Trustees, his account of how he came to NOLS is much simpler and more direct than most. "I was a suit working on Wall Street, and I really wanted to get out into the wilderness and learn some skills," he says. "When they dropped me off with my folding kayak in Alaska and the plane took off, I said to myself, 'You've really done it now.'"

Since his initial plunge into Alaska's Brooks Range with NOLS in 1994, Michael has signed on for a 25 and Over Winter Ski course, 25 and Over Mountaineering course, Gannett Peak Alumni Expedition and, most recently, the Wilderness Upgrade for Medical Professionals through WMI. "He's an avid learner in the backcountry and that has really impressed me," says Pip Coe, NOLS Alumni and Development Director.



*New Board of Trustees Chair  
Michael Schmertzler*

In addition to his time in the backcountry with NOLS, Michael has also devoted his talents to the school through working with the Board. Initially elected in 2001, he then moved to the treasurer position in 2003. He has also served on the Board's Finance/Audit, Strategic Initiatives, Risk Management, and Information Systems Committees.

Now, as the new chair of the Board, Michael brings years of experience in finance, leadership and planning—combined with a passion for the backcountry—to the administration at NOLS. "It's a great privilege and I'm delighted to do it," he says. "It gives me an excuse to stay involved with NOLS." As he takes on the role of chair he will also be instrumental in developing a new strategic plan for the next five years. "I'm looking forward to contributing to writing the next strategic plan for NOLS and starting to implement what that calls for," he says.

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“[MICHAEL] LOVES NOLS AND WANTS TO ENSURE THAT IT CONTINUES TO BE SUCCESSFUL SO THAT A NOLS EDUCATION IS AVAILABLE FOR OTHERS IN THE FUTURE.”

Pip Coe, NOLS Alumni and Development Director



#### NOLS LEADERSHIP QUOTE

**“As a member of the Board of Trustees, I see that, like a NOLS course, we are guided by a leadership philosophy that reflects strong expedition behavior and tolerance for adversity and uncertainty. This is an exemplary model for how governance should work; each individual member is responsible for the good of all and has a readiness to confidently and competently deal with the unexpected. The NOLS Board of Trustees seeks to model expedition behavior that leads to sound governance and stewardship for the NOLS organization.”**

*Flip Hagood, who is the Senior Vice President for Strategic Initiatives for the Student Conservation Association, has served on the NOLS Board since 2004.*

## SUMMIT TEAM PROFILE

## Greg & Pat Wright: Contributing to NOLS Is a Family Affair

BY MEREDITH HAAS

For some campers, nighttime brings shape-shifting shadows and foreign noises that plague the imagination. But for the Wright family of Englewood, New Jersey, nighttime actually rekindled their love for the outdoors.

"When the kids were young we became interested in astronomy," says Patricia Wright, "and it revived our fondness for the outdoors because camping complements astronomy."

Greg and Pat Wright have participated in many NOLS courses and alumni trips, along with their sons, Grant and Gage. Greg, who introduced NOLS to his family, completed his first course in Alaska nearly nine years ago. "I've heard people talk about NOLS—about the professionalism and overall quality of the program—as a high point in their outdoor experience," he says. "NOLS gives a sense of what you need and what you don't. It provides a time for reflection and evaluation of your priorities."

His passion for the outdoors were contagious to Pat, whose first introduction to NOLS was on an alumni family camping trip. "As a parent," she says, "the alumni trip was a great resource because whenever the boys would be in a rough position I'd ask, 'What would a NOLS instructor do?'" She explains that the leadership skills the boys learned on their courses also helped as they worked toward the rank of Eagle Scout. Greg agrees. "NOLS was a way to take the boys' outdoor experience to the next skill level," he says.

As Summit Team members, Greg and Pat have made a provision for NOLS in their estate plan in hopes of passing on their NOLS experience to a more diverse group of people and in order to support NOLS' mission.

This summer Greg and Grant added to their NOLS resumes by attending an alumni horsepacking trip. Pat intends to continue her involvement in NOLS, as well. "It's a contagious experience," says Greg. "[NOLS] provides a greater understanding of the environment and the need for protecting it."

*Greg and Pat Wright are members of the NOLS Summit Team, a recognition society for donors who include the school in their estate or other long-term plans. If NOLS is in your plan, please let us know. Contact us at (800) 332-4280.*



*NOLS Summit Team members Pat and Greg Wright*

BY KIRSTEN JOHNSON

What motivates you when you reach out to NOLS to make a philanthropic gift? It may be having experienced the benefits of NOLS' unique wilderness and leadership education, or it may be your firm commitment to preserving the beauty of the natural environment for the next generation. While many of us put a lot of thought into *why* we give, choosing a cause like NOLS that is close to our hearts, we often neglect thinking about *how* we give. When our giving isn't directed in a planned way we miss out on benefits—for both ourselves and the causes we are passionate about—that come from a having a thoughtful planned gift strategy.

Planned gifts are important opportunities for NOLS and for you as a philanthropist. Determining which gift is right for you and your personal goals is as important as simply making a gift. Planned giving offers a variety of options that give you the flexibility to balance your charitable interests and your financial plans.

Often, the first steps of deciding to make a planned gift can be the most daunting part of the whole process. Stepping back and asking yourself a few questions can help you move past that stumbling block and put you on the path to realizing your philanthropic goals. Considering these questions may help you decide if now is the right time to put together a planned giving strategy:

1) Have you recently gone through a major life change—a divorce, birth of a grandchild, or retirement?

- 2) Are you thinking about the legacy of your life and beliefs that will remain after you're gone?  
3) Do you want to make a lasting impact on the nonprofits, such as NOLS, that you have long supported?  
4) Are you beginning to see assets of yours that you no longer need or that may become liabilities when you pass them on?

These questions are simply a starting place to begin the process of creating a long-term giving strategy. Once you've decided that making a planned gift is right for you and your personal goals, resources abound to help you choose the gift that is the best match for your situation.

### **Bequests: An Important Gift Often Overlooked**

Are you interested in a simple and important gift that allows you to stretch your giving potential? Then you might think about a charitable bequest. While writing a thoughtful plan for the distribution of your assets is something many of us delay or avoid altogether, when you write your will you are creating a document that will care for your heirs as well as your charitable interests. Charitable bequests also have the benefit of providing a 100 percent estate tax deduction.

### **Life Insurance: A Simple Gift**

Do you have an existing life insurance policy that your family no longer needs? Life insurance offers a straightforward way to support NOLS. The most common method is to designate

# Right to the Future

## Gift Option That's Right For You

NOLS the owner of an existing policy, which allows you an immediate income tax deduction. Alternatively, you can simply name NOLS as a beneficiary. Since this is not an irrevocable designation, you do not receive an immediate income tax deduction; however, at your death your executor can take a federal estate tax deduction for the entire amount.

### Life Income Gifts: A Variety of Options

Interested in making a significant gift while still receiving the income generated by your assets? Consider a life income gift, which allows you to make an important contribution while providing a life income for yourself and another. Gift annuities and charitable remainder trusts are examples of these gifts.

### Charitable Gift Annuity

A charitable gift annuity allows you to make a valuable gift that will pay you a guaranteed income. Through the use of an annuity contract, you transfer assets to NOLS and we agree to make periodic, fixed payments to you for the rest of your life. The benefits of a charitable gift annuity extend beyond the guaranteed, fixed income and include an immediate income tax charitable deduction savings on capital gains as the gain can be pro-rated over your life expectancy and therefore reduced. Your annual income depends on your age at the time of the gift.

### Charitable Remainder Trust

To create a charitable remainder trust, you transfer assets to a trust for NOLS' benefit. In return, you or your beneficiary receives an income for life or for a term of years. There are two kinds of charitable remainder trusts, each of which is tailored to meet different financial goals. Whichever option you choose, when you create a charitable remainder trust you receive a generous income tax deduction.

Do you want to be sure to receive the highest possible annual income from your trust? Consider a charitable remainder unitrust. You decide what percentage of the trust assets you wish to receive as income. A unitrust is revalued each year, and the fixed percentage paid out is based upon that valuation. As the value of the unitrust increases, so does your payment, providing you with a hedge against inflation.

Do you prefer the security offered by a stable, reliable income? A charitable remainder annuity trust is similar to a unitrust, but the income you or other beneficiaries receive is set as a fixed amount, and not subject to market fluctuations.

The satisfaction realized by the act of giving is unparalleled. Making thoughtful planned gifts leaves a lasting reflection of your life and beliefs that has a broad impact, securing your legacy and setting a clear example for others.

## VOLUNTEER IN ACTION

### Sandy Colhoun: Helping the NOLS Bus Reach Future Students

BY NICOLE CHILTON



Active NOLS volunteer  
Sandy Colhoun

There is more than one way to volunteer for your favorite organization. After all, it's not always about rolling up your sleeves for heavy labor or donating funds. Sometimes it's the more subtle varieties of volunteerism that can have a far-reaching impact.

Sandy Colhoun, Director of Development for the New Hampton School in New Hampton, New Hampshire, has been helping connect the NOLS Bus—powered by recycled vegetable oil and solar energy—with people throughout the education community in New England. His contacts have been extremely helpful in scheduling the NOLS Bus to visit a variety of private school campuses around the region, putting us in touch with dozens of future NOLS students. "I have strong ties to many of New England's independent schools," says Sandy. "A lot of them are really excited to have the bus on their campuses."

For Sandy, who first came to NOLS for a Wind River Mountaineering course in 1986, the love affair with the outdoors and the transformative power of wilderness education started with the mountains. "I was really interested in the outdoors as a high school student and was determined to go into the mountains on my own," he says. "It was such a great experience. The nexus was NOLS. There was a spark there that lit a lifetime interest and passion for the outdoors. It's a huge part of who I am. NOLS prepared me to go out and do it in a serious way."

Being involved with NOLS has been a lifelong experience for Sandy, and has turned into a family affair, as well. With two sisters, his father and his wife all involved in NOLS, staying in contact has become a routine and enjoyable part of his life. "I'm glad to have helped in any tiny little way I can. I hope to be involved for many years to come."

For more information on the NOLS Bus' New England tour this fall, visit [www.nols.edu/bus](http://www.nols.edu/bus).

Alumni are some of NOLS' greatest resources. Graduates support the school by organizing local NOLS events, networking, recruiting students, and organizing regional chapters. Please contact the NOLS Alumni Department ([alumni@nols.edu](mailto:alumni@nols.edu)) with your interests and ideas to be a volunteer in action.



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# Forecast: Sun!

## NOLS Goes Solar with Grant from Rocky Mountain Power

BY COLLIN McRANN

Whether it's in the field or at our operating locations around the world, NOLS is always trying to reduce our environmental impact. Rocky Mountain Power, a division of Pacific Power, has just made that goal easier. Through their Blue Sky Program, an initiative that supports renewable energy sources, Rocky Mountain Power has provided a generous \$80,000 grant that will provide the majority of funds needed to install a solar panel system atop NOLS Rocky Mountain.

"When we applied this spring, we knew we had a good shot at getting it, and because we ended up receiving 80 percent of the money requested, we plan to start construction this fall," says Gary Cukjati, Assistant Director at NOLS Rocky Mountain.

The system will be installed by Creative Energies of Lander and will consist of approximately 72 panels capable of generating 190 watts apiece. "With 65 kilowatt hours a day being generated, it's about the equivalent of taking 54,000 pounds of carbon out of the air yearly that's otherwise produced from conventional means of power production," says Scott Kane of Creative Energies.

The Blue Sky program at Rocky Mountain Power has several similar projects throughout

the western United States, but so far this is the only one in Wyoming. Over the next five years, NOLS Rocky Mountain hopes to produce 90 percent of the electricity it consumes through the solar installation. Lander, which averages around 300 sunny days a year, is a prime location for solar power. "The project will certainly reduce our consumption of energy from fossil fuels at NOLS Rocky Mountain, and it should give us great experience with installing a solar conversion system that will help us as we look toward similar systems elsewhere at NOLS," says Jennifer Lamb, NOLS Public Policy Director. She adds, "I hope this conversion will have a tangible impact, excite employees and students alike, and help motivate additional projects."

Indeed, the solar panels will serve as a visible reminder to the Lander and NOLS communities of a commitment to renewable sources of energy. NOLS Rocky Mountain will display an educational center showing the system's current and potential output, and will provide an online tracking of energy savings, as well. "We're grateful to Rocky Mountain Power," says Gary. "NOLS does not have the resources to do such a conversion so quickly on its own. I think everyone here is excited to start producing energy."



*Creative Energies outfitted the NOLS Bus with solar panels three years ago (top) and will now design solar arrays for NOLS Rocky Mountain with a grant from Rocky Mountain Power (bottom, artist's rendition).*

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### *New Leadership at NOLS* continued from page 1

Prior to the beginning of his term as chair of the NOLS Board, Michael worked with the International Base Camp Initiative. While the focus was on constructing the international base in Lander, Wyoming, Michael was keen on keeping an eye on the campaign's long-reaching impact on NOLS. "He understands the value of fundraising for educational institutions and the positive long-term impact that it can have," says Pip. "He loves NOLS and wants to ensure that it continues to be successful so that a NOLS education is available for others in the future."

Michael's wife, Kuni, an enthusiastic participant in several NOLS trips, affectionately refers to NOLS as "Nuts On the Loose." As parents, their commitment and admiration for the outdoors has been passed on to their two sons. Ian, the eldest, completed an Alaska Mountaineering course in 2005 and is now a junior at Yale. Their youngest, Ethan, recently completed a month-long Wilderness EMT course through WMI and is joining NOLS again for a Himalaya Backpacking course this fall during a gap year before matriculating at Middlebury.

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### PHILANTHROPIC TIDBIT

## IRA Rollover Giving

BY GRANT WRIGHT

For just a few more months, IRA rollover giving can be a tax-smart option for donors wanting to help their favorite causes. The IRA Rollover Act of 2007—which allows donors over the age of 70.5 to make completely tax-free donations from their IRAs in amounts up to \$100,000—is set to expire at the end of the year.

Until December, such gifts are not treated as income, making them an especially attractive way for donors to help the causes that matter to them without increasing their own personal tax burden.

Curious about the changes on the horizon? Independent Sector, a coalition of charities, foundations, corporations and individuals promoting the charitable community, has excellent fact sheets on the IRA Rollover Act at [www.independentsector.org/programs/gr/IRARollover.html](http://www.independentsector.org/programs/gr/IRARollover.html).

