



# Beginnings

## Passion for Nature + Smart Financial Planning = Academy Legacy

Some day, Sandy Linder will write down all the amazing questions she's heard in 30 years as an Academy docent. Right now, she's too busy providing the answers, and with her husband, Ron—a financial planning expert—helping to sustain the Academy for future generations.

Since childhood, Sandy has been turning over rocks and logs in search of creatures, asking “How?” and “Why?” And when her children were young, she cultivated their interest in nature, often at the Academy. Then, on a whim, Sandy attended a docent training session with a friend. “After two lectures—one on the history of life, one on plate tectonics—I was hooked!” she says.

### Capturing Imaginations

That was 30 years ago, and Sandy has been engaging Academy visitors with nature ever since. “I love showing real things and sharing their stories,” she says. “You never know what's going to capture someone's imagination: a dinosaur bone, a crystal, a collection of skulls.”

Also a former trustee, Sandy is proud to have helped usher the Academy into an innovative new home with a mission that is more urgent than ever.

“The Academy's research is important to our lives and to the world, and docents help visitors make that connection,” she says.



Photo Credit: Nano Visser

Ron and Sandy Linder share their love of nature and the Academy by making a commitment to support the Academy's future.

“And being in the world's largest Platinum ‘green’ public building inspires conversations about how we can live with less environmental impact.”

### Philanthropy With Benefits

Being married to a longtime docent has advantages as does having an estate planning expert in the family.

A partner in Delagnes, Linder & Duey, LLP, Ron says: “If you care about an institution like the Academy and can make a significant gift, by all means do so, and reap the tax advantages.

“But if you aren't ready to make a gift, talk with your advisor about a strategy that suits your financial situation—maybe converting bonds into annuities, or making a gift from your retirement fund.”

Both options benefit your heirs, he says, and enable you to make a difference for an organization you believe in.



To learn more about planned giving and the Eastwood Associates, please contact:

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# Q&A With Chris Andrews

Chief Operations Officer, Director of the Steinhart Aquarium

**Q:** You're responsible for every living creature at the Academy, except the people! What question do you hear most often about your work?

**A:** "How do you care for the animals?" The answer is: We apply science-based stewardship techniques. The "bring 'em back alive" days—where, when one died, you went out and caught another one—are long gone. Today, we want to keep the animals healthy and even breed them, sometimes for the very survival of the species. Last year, we videotaped the process of bringing 70 animals, representing some 50 species—lizards, snakes, frogs—back from Costa Rica. In our *Science in Action* exhibit, you can see it all—getting permits, packing specimens, the quarantine process, the release into new habitats.



*"Long-term legacy support enables us to plan for the future, far beyond day-to-day needs."*

—Chris Andrews, Chief Operations Officer  
and Director of the Steinhart Aquarium

**Q:** What's different about the way the Academy engages people with the natural world?

**A:** Our formula is: "Attract. Intrigue. Inform. Involve." And we bring it to life through beautiful, living displays, digital technology, and meaningful people-to-people experiences that engage the emotions. Everyone from the docents to the gift shop staff understands that for some child or adult waiting in line to come in, this is the long-awaited day at the Academy. And it may be our one chance to meet that guest's expectations, to deliver the "wow-factor." If we don't touch the emotions, we will not achieve our mission. We must engage people in ways that make nature real and relevant in an increasingly digital world.

**Q:** What are some don't-miss opportunities coming up at the Academy?

**A:** Don't miss *Spring to Life* in the piazza, a six-week promotion focused on eggs hatching, life reawakening. In the summer, we'll have snakes and lizards to interact with all around the building, dispelling myths about these amazing creatures and unveiling a rarely seen world. And in 2012, across the Academy, you'll find eye-opening exhibits focused on earthquakes.

**Q:** What role do legacy gifts play?

**A:** The Academy has been here for more than 150 years. And with Earth's biodiversity vanishing and many unanswered questions about the universe, our mission has never been more relevant than it is today. Ongoing support is necessary to daily operations. Long-term legacy support enables us to plan for the future, far beyond day-to-day needs.

# Plan Smart, Give Smart, and Reap the Benefits—Today and Tomorrow

Ron and Sandy Linder combine their love for the Academy with good estate planning, and you can follow their example—choosing double-duty gifts that benefit you and help the Academy.

For most of us, 2011 tax changes eliminated the need for complex *tax* planning. But we all need to do good *estate* planning when we decide who gets what from our legacies.

- Start with a careful inventory of what you have.
- Consider the needs of your loved ones and the charities that can make their world a better place.
- Explore the best ways to make those gifts. Seek the advice of an estate planning attorney to draft your will or living trust or update your current plans.

## A Simple, Yet Powerful Way to Give

One smart option, a bequest to the Academy from your living trust or will, gives you lifetime flexibility, access to the asset, and the satisfaction of knowing that, someday in the future, you will leave an important charitable legacy.

But other gifts may suit you even better. For example, you could designate the Academy as the beneficiary of your

retirement funds and leave other, non-taxable assets for loved ones.

A timely gift plan allows you or possibly someone else to live in your home, vacation property, or farm for their life. After their occupancy, the Academy receives the home or property. And you get a significant, charitable income tax deduction for this future gift. Right now, low interest rates yield larger deductions.

Another great gift to consider now involves making a lead trust, which gives a portion to the Academy each year, then returns the balance in the trust to you or your selected loved ones.

## Don't Sleep on Tax Law Changes

For immediate impact, remember that Congress recently extended a law that allows individuals 70½ or older to make tax-free gifts to the Academy of up to \$100,000 directly from their IRAs. A gift from your IRA this year may be the most tax-effective gift you can make—whether or not you itemize. This opportunity is scheduled to expire at the end of 2011.

Life income gifts—trusts, pooled income funds, and annuities—are a wise way to combine smart planning with future giving. In addition to giving you or loved ones professionally managed income, they also yield capital gains and other tax benefits.



## Need More Information?

Learn more about gift options that can benefit your loved ones and support the mission of the California Academy of Sciences. To start the conversation, contact Doria Leong at 415.379.5407 or [dleong@calacademy.org](mailto:dleong@calacademy.org), or Roxanne Lee at 415.379.5408 or [rllee@calacademy.org](mailto:rllee@calacademy.org).

Visit our website at [calacademy.org/giftplanning](http://calacademy.org/giftplanning) for more information.

## Welcoming New Eastwood Associates

The following generous friends made planned gift commitments to the California Academy of Sciences between October 2010 and March 2011. We are proud to count them as Eastwood Associates.

Anonymous (3)

Royal C. Brown and Margie Hom

Tracy Donahoe and Kenneth Lim

Donald and Jacqueline Jacobberger

David and Mary Sutton

If your name should be on this list, please let us know.

## Honoring Long-time Friends

Generous gifts from the estates of the following Academy friends will support the mission we all share—engaging people with the natural world, advancing scientific research and education, and promoting sustainability.

Frank W. and Margaret Adelstein

Barbara C. Barnett

Muriel Talbot French

William P. Gaddis Jr.

Charles M. Goethe Trust

Rolph-Nicol Fund

Jane W. Steel

Marie Urrere-Pon

Berthilde F. and Henry C. Williams

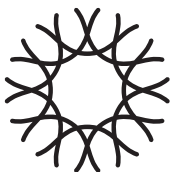
## Save the Date!

On June 10, the California Academy of Sciences will welcome Eastwood Associates to a special reception celebrating *Snakes and Lizards: The Summer of Slither*. If you have provided for the Academy in your estate plans, please let us know using the enclosed reply card. We would be honored to invite you to join us.

## Want to Know More? Start Here.



Return the enclosed reply card to receive a copy of the brochure *The Top 7 Questions to Ask Your Estate Planning Attorney* and/or *Your Personal Guide to Gift Planning*.



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*"We are grateful for the generous commitments from Eastwood Associates to ensure a vibrant future for the Academy and generations to come. You are an inspiration to all of us. I look forward to thanking you for your support and welcome the opportunity to learn more about your involvement and interests. Thank you!"*

—Doria Leong, Director of Leadership Gifts

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