



Woodie Wheaton Land Trust

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possible. Your generous support of the Woodie Wheaton Land Trust secures permanent public access and allows for the protection and stewardship of the land and water now and for generations to come.

Thank you to all who are a part of WWLT and the ongoing efforts to protect the natural splendor of the Chiputneticook Lakes region.



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To promote conservation of the Chiputneticook Lakes

WOODIE WHEATON LAND TRUST

CONSERVATION NOTES

Issue 21, Fall 2021

PERSISTENCE

by Dale Wheaton, WWLT Director

Your land trust is constantly trying to conserve wildland in the lakes region. Opportunities are usually *created*; they do not simply appear. And it may be very difficult to entice a seller or negotiate a reasonable price. Rewards come with commitment and persistence.

As this message is written, October 1, WWLT may be on the threshold to acquire another significant property to conserve for public benefit. We wish we could say more.

What else have we been up to?

The Trust secured a grant to purchase gravel for Castle Road in Forest City, where local resident Mike Thomas graciously spread the gravel and graded this important access to Spednic Lake. The Stewardship Committee erected an informative kiosk at the East Grand Headwaters Forest in Amity, while struggling to maintain roads flooded by beavers. New culverts were installed and careful repairs made.



We have been aggressively working to secure permanent

public use and access to the Forest City boat launch on Spednic Lake for several years. Meticulous work to document the title history and explicit record of open public use since 1960 serve to support the case. Things have now entered the legal arena.

Outreach events received outstanding participation in 2021. Local youth swarmed the ATV Safety class in June. Well-known Maine ornithologist Bob Duchesne taught many of us at the Guided Birdwatching Tour how to distinguish a crow from a seagull. The Comedy Nights, Boat Parade, and Lobsterfest were fun events. Hands-on enthusiasts at the Fly –Casting Clinic sharpened their hauls and delivery strokes. And no injuries! Jana's Get Moving fitness class resumed, turning aging ladies into rock stars.

We continue to nurture the 65 shade trees planted in Forest City in 2017. (All except two are flourishing; all survive.) Beautiful sugar maples will grace the village long after your current Board members have themselves been planted. WWLT is also working with several local citizens in Brookton to create a nature reserve.

Shane brought a high-tech filming crew from Florida to Forest City in August to film many of our accomplishments on the landscape. Using drones and professional film

makers, one can readily see why we work to protect Mother Nature. You will see the results soon on our upcoming new website.



We were privileged to have Karin Tilberg address our Annual Meeting. She is the Executive Director of the Forest Society of Maine, which stewards conservation easements over thousands of forested acres. Our missions align, and she thanked us for being creative and proactive.

WWLT benefitted from much unsolicited press coverage this year. "Hiking in Maine: East Grand Highlands Trails Provide Beauty and that Hard-to-Find Solitude," (*Portland Press Herald*, 8/8/21), and "Woodie Wheaton Land Trust hosts inaugural Boat Parade on East Grand Lake," (*Houlton Pioneer Times*, 9/6/21) speak for themselves. An upcoming book, *Preserving Vacationland*, by Scott Andrews, chronicles the conservation achievements of WWLT and others in eastern Maine.

There is lots more to be done. Thank you for your confidence and support.

Letter From the President



Jill Wheaton

Dear Members,

I hope this note finds you happy, healthy, and enjoying fall wherever you are. I, myself, have extended my summer stay in Maine through October. I always forget how beautiful and unique New England becomes this time of year.

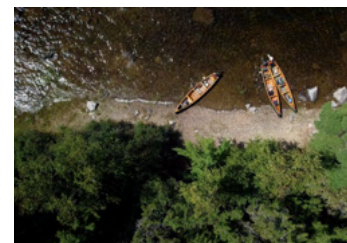
A year ago, 2020 presented some challenges for WWLT. We had to cancel our summer speaker series due to safety concerns around gatherings. Many of our normal fundraising opportunities were sidelined. Yet, in our social distance, the directors took the opportunity last winter to virtually unite and engage in a series of workshops with a nonprofit consultant. She led us through provocative discussions about where WWLT is in its lifecycle and what critical pivots we would need to make in order to thrive into perpetuity. We committed to finding an individual who could lead WWLT in business development and grow our endowment to a level capable of providing critical ongoing cash flow.

We also teamed up and whiteboarded our fundamental beliefs as an organization. We identified four core values necessary to guide decision-making long past our tenures as directors. They are:

- ♦ **Conservation:** Conserving and caring for the natural environment of the Chiputneticook Lakes Region.
- ♦ **Education:** Connecting people to nature by providing information and experiences that create lasting impressions.

- ♦ **Community:** Creating relationships within the community to build a sense of common purpose in support of conservation.
- ♦ **Stewardship:** Strategically managing the land through protection and restoration while encouraging responsible community access.

The time spent going inward last winter has led to a positive explosion of activity. We enjoyed a robust summer event schedule in 2021 that included our first annual boat parade, our popular comedy night, our annual meeting hosted again in-person at the trust center, and other community events. We are in the process of rebranding and rebuilding our website to be more in line with our identity as an organization. Several of our directors pulled together to bring a film crew to Forest City in August to capture hours of footage we'll be able to use for many years to come. Amidst all this, last year we acquired and conserved a new parcel of land at the Headwaters of East Grand Lake, which is, of course, what we're all about.



I'm proud to serve alongside the ambitious, heart-centered directors our board comprises and ever grateful to all of you whose generosity allows us to keep pursuing this noble mission.

Wishing you a wonderful fall,

Jill

A Summer in Review... 2021 Summer Speaker Series & Events



New WWLT Website Coming Soon!

To increase awareness of our conservation efforts within the region and to help us more effectively achieve our mission, we are in the process of creating a brand new website for the Woodie Wheaton Land Trust. This new, user-focused, and easy to navigate website aims to keep our members and local community up to date with the ongoing endeavors of the trust by highlighting current projects, educational events, and various other resources beneficial to residents and visitors in the area. And for those interested in opportunities to support our work, it will also serve as the primary platform for volunteer engagement, membership renewal, and contributions. Our anticipated launch date is mid-November, so stay tuned!

A Trip to the East Grand Headwaters Forest

If you've driven past or on the Champion Road in Amity recently, you may have noticed a large wooden kiosk. Thanks to Curtis Allen, owner of Custom Cut Construction, who built the kiosk, it welcomes visitors to the East Grand Headwaters Forest. The kiosk houses a kiosk poster that was created by WWLT summer interns Ben and Devin. The kiosk poster is an informational and visual display of the properties, containing a map, information on WWLT, and a list of the rules for the property. It also provides visitors the option to complete a survey on their phone to tell us about their Headwaters Forest experience.



Ways to Gift and Make the Most Impact

by Paul Benny, WWLT Director

Each year millions of Americans give generously to support their charitable interests. We hope that the Woodie Wheaton Land Trust and this very special place we protect are on your list.

Taking time to consider when and what to give and how best to structure the gift can make a difference in how much you decide to donate now and in the future.

1. *Choosing the right means.* What form of asset you decide to give can be vital in determining how much you would like to donate.

2. *Timing is essential.* Through careful timing of your gifts, it may be possible to accomplish multiple objectives that result in potential tax savings and other financial benefits.

3. *Giving in the right way.* Whether you finalize your gifts now or in the future, special opportunities may allow you to make a larger contribution than you thought possible.

Making gifts now

Giving cash by check, credit card, or other means of transfer is the most common way to make charitable contributions. Recent tax law changes continue to encourage cash gifts.

For example, cash gifts can eliminate federal income tax on up to 60% of your adjusted gross income (AGI) each year. You may also enjoy state income tax savings.

Amounts in excess of allowable limits for a year can be used to reduce your income taxes for up to five additional years.



Enjoy Noncash Giving

If you own stocks, mutual funds, or other securities that have increased in value, and you have owned them for more than one year, it can be wise to use them to make charitable gifts.

There are two benefits because there is an itemized deduction for the full market value of donated securities, not just their cost, and you do not have to pay capital gains tax that would be owed if you instead sold those securities and donated the proceeds.

The combined savings of both regular

income tax and capital gains tax can make gifts of securities especially attractive.

Giving securities that have increased in value but yield little income can be a good choice. This can be a way to make a special gift and enjoy additional tax savings while experiencing little or no reduction in your spendable income.

Giving appreciated securities can also boost your itemized deductions above the standard deduction amount, allowing you to also enjoy tax savings from other deductible expenses.

Gifts of appreciated securities may eliminate tax on up to 30% of your AGI. Gifts of larger amounts can reduce taxes in up to five future tax years.

When securities have decreased in value

If a security is worth less than its cost, it is usually best to sell that security and make a charitable gift of the cash proceeds.

You may then be able to take deductions for both the capital loss and the charitable gift. This can make it possible to deduct more than the current value of the security.

Continued on next page ►

Ways to Gift –

CONTINUED

Give a Security and “Keep” It

What if you are reluctant to give a security that has increased in value because you believe its value may continue to grow in the future?

In that case, it may be more effective to give the security, deduct its full value and bypass capital gains tax on the amount of the increase in value up until the time of your gift.

Giving Other Noncash Assets

Other property that has increased in value—such as art, jewelry, antiques, or real estate—may also make practical gifts.

Whether or not a gift of such assets is tax-deductible (and the amount of the deduction you may claim) depends on the type of property, its value, and how the charity will use it.

Gifts From Retirement Funds

Special tax and other benefits can result by giving from your retirement account.

For example, suppose you are required to withdraw funds annually from your individual retirement account (IRA) or other retirement plan. In that case, you may find that making gifts using all or a portion of the withdrawn funds can be a good way to minimize, or even eliminate, taxes on the amount withdrawn, while also removing the amount given from your estate for federal and/or state tax purposes.

In the case of a traditional IRA, people age 70½ and older may make tax-free gifts totaling up to \$100,000 per year directly to a qualified charity.

This direct transfer to charity from an IRA is called a “qualified charitable distribution.” This option can be especially attractive if you do not itemize your tax deductions or you would like to keep your reportable income down to avoid having your Social Security and other income taxed at a higher rate.

Life Insurance Gifts

Life insurance policies not needed for their original purpose may also be a good option for making charitable gifts. For example, if a

policy is no longer needed by loved ones or is no longer required to cover estate taxes, consider using the policy to make a charitable gift.

Give and Receive Income

Did you know that you can make a gift today and receive income from the gift for yourself and/or one or more other people? The income can be received for life, or in some cases, it may continue for another period of time you choose.

Through the use of special planning tools, you can make gifts while providing for retirement, supporting parents or other loved ones, or arranging funding for educational expenses or other special needs.

These plans can feature immediate income and/or capital gains tax savings. Giving in this way can be especially attractive to those who do not ordinarily itemize their tax deductions. That is because deductions related to these gifts may help boost your total deductions above the standard deduction amount, allowing you to benefit not only from the charitable gift but from other deductions as well.

Making Gifts Over Time

You may even make a charitable gift for a period of time before the assets funding the gift are returned to you and/or your heirs.

A *charitable lead trust* is one such gift that can allow you to make charitable contributions over a specific time period you choose. When the assets pass to other heirs after the charitable gifts are completed, the value of the gifts from the trust will serve to reduce or eliminate federal and/or state income, gift, and estate taxes that might otherwise be due. In this case, the payments are distributed to charitable organizations.

Making Future Gifts

You may also wish to consider making charitable gifts that will be received in the future as part of your financial and estate plans.

Giving through a will can be a convenient way to make a gift in the future. You may decide to make a gift of a specific amount, a percentage of your estate, or all or part of what remains after you have remembered family and friends.

Giving through living trusts is another possibility. Many people's estates will be distributed primarily through a trust they created during their lifetime (often referred to as a “living trust”).

Giving the proceeds of a life insurance policy no longer needed for its original purpose can also be a practical way to make a future gift. You may name one or more charitable interests to receive all or a portion of a life insurance policy's value at death. In some cases, income tax and estate tax benefits can result from giving in this way.

Gifts of retirement plan remainders are increasingly popular as more people have accumulated a significant portion of their assets in tax-favored retirement plans and because individuals who inherit these plans must usually pay income tax when they withdraw the funds.

Giving bank or investment account remainders is another option. In most states, you may name a charity to receive all or a portion of what is left in an investment account. These are known as “pay on death” (POD) or “transfer on death” (TOD) arrangements.

Maximizing Tax Savings Going Forward

In general, the higher your tax bracket, the more significant the savings from your charitable gifts.

To experience the full tax benefits of your gifts, however, your itemized deductions must total more than the standard deduction amount you are allowed to subtract from your income whether or not you itemize your deductions.

Check with your tax advisor when considering the amount and timing of your charitable gifts. You may find that one or more of these ways to give will help you meet long-term charitable goals while first providing for your own needs and those of your loved ones.

More information about the ways to give discussed in these pages is available upon request.

2021 Summer Internship Program

The Woodie Wheaton Land Trust's Summer Internship Program was created to provide college and graduate students with an opportunity to contribute to the conservation of the Chiputneticook Lakes region during their summer break, while also receiving invaluable work experience and professional growth.

Our Summer Internship Program, welcomed Ben Oesterling and Devin Escue. Ben, a recent graduate of Pennsylvania State University, assisted the Trust in creating a new WWLT Property Map, the map and kiosk poster for the East Grand Headwaters, and our first-ever map of Spednic Lake.

Devin, a recent graduate of Southern Illinois University, wrote a Forest Management Plan for WWLT's newest property acquired last year, the Headwaters Forest, created a new map for the East Grand Highlands Hiking Trails, and updated the East Grand Lake map.



Ben and Devin were a tremendous help with trail maintenance of the East Grand Highlands Hiking Trails and monitoring all WWLT properties. The Trust extends a big thank you to them both for their hard work and wishes them the best of luck in their future endeavors!

WWLT 2022 Calendar

It's not too late to purchase your calendar for next year. When you buy our 2022 WWLT Calendar, you help support our mission of protecting and caring for the natural environment of the Chiputneticook Lakes Region. This calendar features the photographic work of the late Dr. Bob Ellis, a long-time member and supporter of the Woodie Wheaton Land Trust. Many of his beautiful photographs are of East Grand Lake and the surrounding region.



To order your calendar(s), please mail a check/cash, in the amount of \$20.00 plus \$5.00 shipping fee, to WWLT at 2 Grove Road, Forest City, ME 04413, or by sending an email to office@woodiewheaton.org. You can also purchase your calendar on our website at www.woodiewheaton.org.



They make great Christmas gifts!

Grab Your Hiking Boots and Hit the Trails

This summer, the East Grand Highlands Hiking Trails (EGHT) received new trail markers and a new kiosk map. After many hikers expressed their concerns that the color of the markers on the trail did not match the color of the trails on the map, we decided it was time for a change. With the help of Steve Mine, former WWLT Director, our summer interns cleaned all three trails, picking up and cutting back branches, as well as clearing trees that had fallen across the trails. They also remarked them with new trail markers. In addition, they created a new map for the trailhead kiosk that matched the trail marker colors to their appropriate trails. If you haven't yet hiked the EGHT, Fall is the perfect time to do so. We promise that the fall foliage and scenic views will not disappoint.



WWLT's Newest Director



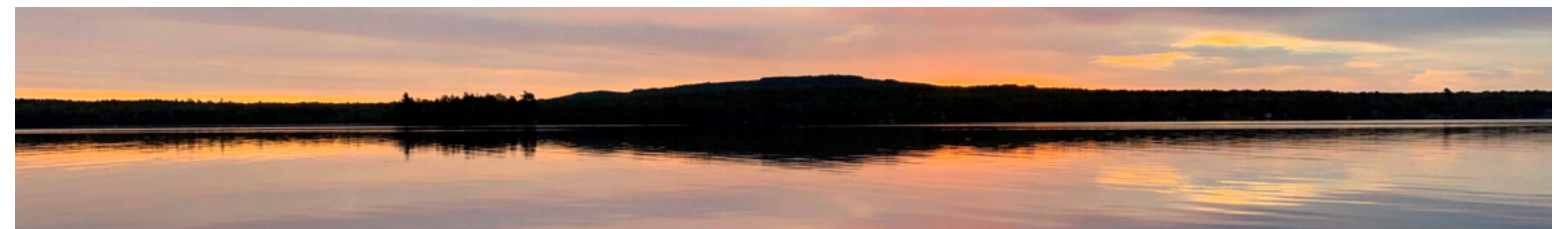
Bill Hamilton

A lifelong resident of the area, Bill is a third-generation Master Maine Guide. His parents owned a set of sporting camps on Sysladobsis Lake in Lakeville, Maine. He grew up in the sporting life and knows the value of the special areas protected by the WWLT. "The way of life that we and visitors alike have enjoyed in these special places is worth protecting. The idea that I may be able to help protect the woods and waters of Eastern Maine and Western New Brunswick for current and future generations appeals to me," said Hamilton.

Bill has worked protecting the natural resources of Maine for nearly 43 years. He began his career with the Maine Forest Service in 1979 and has risen through the ranks to his current position of Chief Forest Ranger of the Maine Forest Service. Bill has served on numerous

regional and national working groups, and for the past 25 years, has been on the board of selectmen for the Town of Lee, Maine.

Bill and his wife Pam Amero Hamilton have a cottage on East Grand Lake. Their family built the original cottage in 1964, which they replaced in 2005. Beginning in the spring of 2022, Bill and Pam intend to spend much of their time at East Grand Lake.



Summer Speaker Series Event - WWLT Boat Parade

by Brianne O'Leary, WWLT Director



This year, the Woodie Wheaton Land Trust added a new event to its Summer Speaker Series, a Boat Parade! The Boat Parade, which occurred on Saturday, July 24, made its way down The Arm just past Treasure Island and then up along the shoreline of Sandy Beach Road. The small but mighty parade included boats decorated as Sponge Bob, a Giant Loon, and a deserted raft with a sail. More boats joined as the parade was happening because observers saw how much fun it was. In keeping with WWLT tradition, two Grand Lake canoes also participated. One canoe was occupied by Lance Wheaton and his daughter, Gwen Campos, and the other by Randy Campos and Mark Fowler. The canoes were able to motor close to the shore to hand out

goodie bags full of candy, fun trinkets, and environmental educational material to the families that came out to see and hear all the commotion. Top honors for the best decorated boat went to The Loon Pontoon, driven by Bob Parker and accompanied by his guest Jane Johnson—both of Forest City, Maine.

The parade was well received by all, with many requests that it become an annual event. It is our hope to make it a tradition. Keep an eye out for next year's Summer Speaker Series and Events flyer for information on our 2nd annual Boat Parade.

