

Heritage Society

Preserving Lincoln Park Zoo for Future Generations

Lincoln Park
Zoo

A Zest for Giving

For Anne McCreary Juhasz, Ph.D., generosity is something that was ingrained during a lively childhood as part of a family of 10 in Ontario, Canada. “I grew up with parents who emphasized giving—gifts to the family and help to those less fortunate. The fun was in giving,” she says.

Today, the retired educator remains an eager philanthropist, supporting institutions ranging from the Lyric Opera to the Blyth Art Center and Festival in Blyth, Ontario. But one institution has proven dear to her heart: the free urban oasis of Lincoln Park Zoo.

“It’s a favorite place,” she says. “I’ve been living in Chicago 30 years, and I started coming to the zoo right away.”

Traveling the world

Anne’s path to Chicago—and Lincoln Park Zoo—was a lively one. After earning a teaching degree in Stratford, Ontario, her career in education grew from teaching in a two-room schoolhouse to earning a doctorate from Cornell, with stops in Stockholm and Vancouver along the way.

Moving to Chicago when her second husband, Stephen, was recruited by Loyola University, she taught at the university as well, starting a family studies curriculum, working with graduate students from around the world and bur-nishing an impressive academic resume.

Enjoying Lincoln Park Zoo

She also found time for regular zoo visits, riding her bike down the Lakefront Trail to watch families and children interact with the animals. After many years of supporting Lincoln Park Zoo as a member, Anne found a perfect outlet to deepen her support with charitable gift annuities.

“I liked the idea of supporting an institution I love and receiving an income that can help cover my expenses,” she says.

Anne has set up three gift annuities with the zoo: two will support the zoo’s general operations while a third is designated for her beloved Pritzker Family Children’s Zoo. All provide the undeniable satisfaction of knowing she’s making an impact.

“I keep trying to find out how I can make a difference,” she says. Gift annuities, it seems, offer an ideal opportunity.



Anne McCreary
Juhasz, Ph.D.

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Winter weather gives Amur tigers the opportunity to romp in the snow. Even on the coldest days of the year, the zoo remains free and open to all, thanks to our dedicated donors.

While gift annuities are a great way to make a gift to Lincoln Park Zoo, there is a way to make a significant gift to ensure a strong future for the zoo without impacting your current cash flow. By including the zoo in your estate plans, you will be creating a wonderful legacy to support a place that means so much.

For information on including a bequest for Lincoln Park Zoo in your estate plan or to request sample bequest language, please visit our website at www.lpzoo.org/pg/bequest_language; call Marilyn Schaffer, director of planned giving, at 312-742-2167; or use the enclosed reply envelope.

Income for You and a Gift for Lincoln Park Zoo

Gift annuities are a way to make a meaningful charitable gift to Lincoln Park Zoo while you enjoy income for life.

You may create a gift annuity for your life only, for your life and that of your spouse or other loved one, or for the life of one or two other persons. Income payment rates are based on the age(s) of the person(s) receiving payments. See the following examples for two possibilities.

Payments for one person

Betty, age 78, decides to fund a gift annuity with Lincoln Park Zoo using \$10,000 in cash. At her age, she will receive \$680 (6.8 percent x \$10,000) each year for the rest of her life. And because part of the amount given will be used by the zoo, she is entitled to a charitable income tax deduction of more than \$4,600.

Payments for two people

Jack and Lois, ages 76 and 74, decide to use stock that pays them only 2 percent in dividends to fund a gift annuity that will continue payments for both of their lives.

They are entitled to payments equal to 5.7 percent of the amount transferred as well as a generous tax deduction. See the chart on page 3 for examples of selected rates for one or two persons.

Deciding what to give

To receive maximum benefits from a gift annuity, it's important to think carefully about the property used to make your gift. Consider the following assets as you decide what might offer the greatest opportunity for you:

- Cash or the proceeds from bonds, certificates of deposit or other investments that may be providing less income than desired.
- Stocks or shares of mutual funds that have increased in value since you have owned them but yield little or no income. Because capital gains tax may be bypassed at the time you fund a gift annuity, this can be a good way to make a gift while increasing your cash flow.
- Withdrawals from retirement plans you may be required to make. A gift annuity can offer a way to set aside more of such funds to provide future income while reducing taxes that would otherwise be due today.

The purpose of this publication is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Tax deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states. 2.8% AFMR ©MMXI RFSCO, Inc. All Rights Reserved.

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Five Ways a Gift Annuity Can Benefit You

There are a number of ways that a gift annuity can benefit you.

- 1. Attractive rates.** Mrs. Fox, age 82, receives a modest income from her certificate of deposit. When the CD matures next month, she plans to establish a gift annuity with Lincoln Park Zoo. At her age, she will receive nearly twice the amount she is currently receiving from the CD.
- 2. Regular, fixed payments.** With a gift annuity, you can count on receiving fixed, regular payments, regardless of what occurs in financial markets.
- 3. Tax-free payments.** Part of each gift annuity payment is free of tax for a period of time.
- 4. Income tax deduction.** Because part of the gift annuity will be used for charitable purposes by the zoo, persons who itemize are entitled to an income tax deduction for the gift portion of their gift annuity in the year the gift annuity is established.
- 5. Bypass capital gain.** If you have stock that has increased in value and you use it to fund your gift annuity, you can bypass part of the capital gain tax that might have been due had you sold the stock. Any remaining capital gains tax due will generally be spread over your life expectancy.

Perhaps the greatest benefit of a gift annuity is the personal satisfaction you receive from supporting Lincoln Park Zoo.

What Rate Would You Receive?

To estimate the annual payment you might receive from a gift annuity, multiply the rate for your age by the amount you may wish to give.

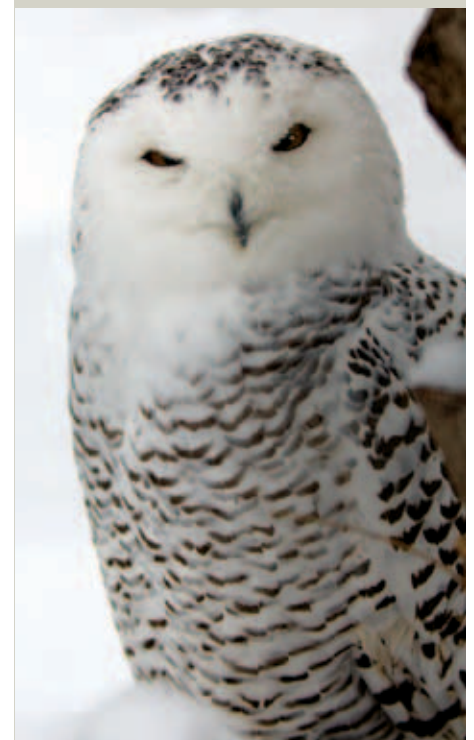
For example, the chart above shows an 80-year-old receives annual payments at a rate of 7.2 percent. Therefore, \$20,000 given for a gift annuity would result in payments of \$1,440 each year ($\$20,000 \times 7.2$ percent).

For more information about the benefits of gift annuities, contact Marilyn Schaffer, director of planned giving, at 312-742-2167 or via e-mail at mschaffer@lpzoo.org.

Gift Annuity Payment Rates			
Selected Rates for One Person		Selected Rates for Two Persons of the Same Age	
Age	Rate	Ages	Rate
90+	9.5%	90/90	8.3%
85	8.1	85/85	7.1
80	7.2	80/80	6.3
75	6.4	75/75	5.7
70	5.8	70/70	5.4

For illustrative purposes only. Please write for current benefits and rates for other ages.

As the zoo turns into a winter wonderland, your support continues to ensure top-notch care for snowy owls and other cold-loving creatures.



Zoo Update: A New Gibbon Swings In

The white-cheeked gibbon exhibit at the Helen Brach Primate House is always a favorite for visitors. Guests gather to watch the endangered apes swing through the branches of their exhibit, using their long arms to spring from rope to branch to elevated perch.

A recent arrival will only increase visitor interest. An infant gibbon was born on January 6, bringing the number of these endangered apes at Lincoln Park Zoo to three. The little one was the third offspring for mother Burma and father Caruso, who are paired through the Association of Zoos and Aquariums' Species Survival Plan®. (Older siblings have moved to new zoos, where they've been paired with their own partners.)

At present, the infant gibbon blends in smoothly with mom's blond coat. In a couple of years its fur will shift to



This is one of the first photos of the baby white-cheeked gibbon, born on January 6.

a striking black before resolving to a final color at maturity: blond for a female, black for a male.

“The parents are doing great, and the infant is a good size with a tight grip,” says Curator of Primates Maureen Leahy. Come by soon to see for yourself!

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Lincoln Park Zoo
2001 North Clark Street
Chicago, IL 60614

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