



## LEGACY SOCIETY

MAKING YOUR COMMITMENT TO  
CONSERVATION LAST FOREVER

The Driftless Area is more than just a beautiful place—it's a region rich with meaning. For generations, people have found purpose, peace, and inspiration here, whether by connecting to its quiet beauty, working its land, or exploring its rare and rugged landscapes. Its future depends on what we choose to do today.

By including Driftless Area Land Conservancy in your estate plans, you can help ensure this extraordinary region is protected for generations to come. A legacy gift is timeless. It honors your values and helps safeguard the Driftless for the future.

Anyone who has made a planned gift and completed a Note of Intent is welcomed into DALC's Legacy Society. There are no fees or minimum gift amounts—just a simple step toward making a lasting difference.

As a Legacy Society member, you'll be invited to special gatherings like our annual Legacy Picnic and have opportunities to share your conservation story. With your permission, we'll also celebrate your generosity in our newsletters—so the community can join us in honoring your commitment to the Driftless.



# THE GIFT OF A LIFETIME

## TOOLS FOR CREATING A LEGACY OF CONSERVATION

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### **BEQUEST LANGUAGE**

You may designate your bequest to be used by DALC for its general charitable purposes by including the following language in your will or trust:

***I give \_\_\_\_\_ to Driftless Area Land Conservancy, Inc., a Wisconsin nonprofit, nonstock corporation that is recognized as exempt from taxation under Section 501(c)(3) of the Internal Revenue Code of 1986 (as amended) with principal offices located in Dodgeville, Wisconsin (or successor organization), to be used for its general charitable purposes.***

Bequest language may vary from state to state, so it is advisable to use an attorney who understands local estate laws. With that in mind, you may want to provide the following information to your attorney:

**Official Name:** Driftless Area Land Conservancy, Inc.

**Federal ID:** 39-2017802

206 S. Iowa Street P.O. Box 323 Dodgeville, Wisconsin 53533

### **BEQUEST GIFTS**

Gift of cash and other assets, such as appreciated stock: The most straightforward way to give is with an outright gift of cash. Your attorney can include your bequest to DALC in your will or trust, or as a codicil (amendment) to your will.

### **DESIGNATION AS BENEFICIARY OF RETIREMENT PLAN OR IRA**

You can name DALC as a beneficiary of your retirement accounts, including pension plans, profit-sharing plans, stock bonus plans, Keogh Plans, 401(k) plans, and Individual Retirement Accounts (IRAs). You can decide whether to leave a percentage or the entire amount of your retirement account.

### **INSURANCE BENEFICIARY DESIGNATION**

You can name DALC as the primary or secondary beneficiary of your life insurance policy by simply contacting your insurance agent.

### **GIFT OF LAND**

If you intend to make any gift of land, please contact Angie Buelow at [angie@driftlessconservancy.org](mailto:angie@driftlessconservancy.org). Owning land is a great responsibility that we take very seriously. When land is donated to DALC, we evaluate it in terms of our capacity to manage it indefinitely as a preserve and its fit with our conservation goals. If we cannot manage it as a preserve, we may choose to sell it (with a conservation easement if that is appropriate). Proceeds are used to further conservation efforts across our region.

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# WAYS TO GIVE FORWARD

## STEWARDSHIP AND ENDOWMENT FUNDS

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### **DALC's Forever Fund consists of:**

**a. The Conservation Easement Stewardship Fund**, provides sustaining funds to ensure that all of our conservation easements are monitored and appropriately stewarded. Activities include annual monitoring, building and maintaining relationships with landowners, reviewing/approving requests to implement reserved rights, and preventing and resolving easement violations. This fund grows primarily via restricted donations from landowners who donate or sell conservation easements to DALC, but DALC can augment this fund through other unrestricted donations.

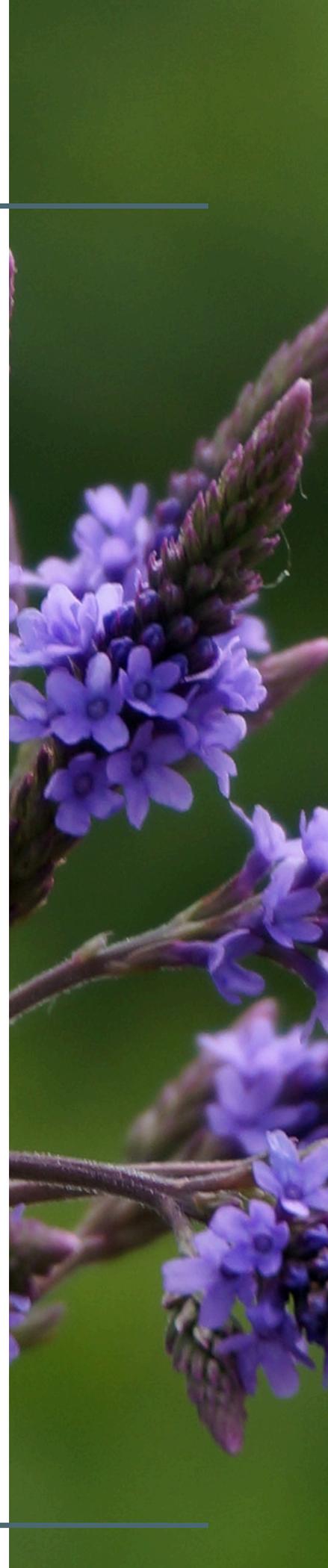
**b. The Legal Defense Fund** provides sustaining funding to ensure DALC has the resources to defend our interest in land (be it a conservation easement interest or ownership) in court. DALC participates in Terrafirma. Terrafirma is a charitable risk pool owned exclusively by participating land trusts that insures its members against the legal costs of defending conservation. Terrafirma also provides information and training on risk management to members. This fund grows primarily via restricted donations from landowners who donate or sell conservation easements to DALC, but DALC can augment this fund through other unrestricted donations.

Our **Driftless Conservation Impact Fund (DCIF)** was established in 2022 from a generous donation of land from Helen Boley. Her land is protected forever by a conservation easement. DALC created this fund, restricted by the Board of Directors and managed by Buttonwood Financial Partners, with the proceeds of the sale to a private landowner. The goal of the DCIF is to make catalytic investments in conservation in the Driftless Region, while also providing sustaining support for DALC conservation work.

The **Driftless Trail Fund (Trail Fund)** was established in 2024 to build and maintain the Driftless Trail. This fund originated from Judy Lovaas' extraordinary bequest. Building and maintaining the Driftless Trail includes activities such as brush clearing and dirt work to build new trails, chainsaw work to open trails after storms, repairing erosion issues, working with and training volunteers, survey work, and hiring contractors and consultants. This fund is invested with Buttonwood Partners.

The **Land Management Fund** was established in 2024 with a restricted donation from James and Rose Sime. The purpose of the fund is to provide for ecological land management of DALC nature preserves, including activities such as maintaining current land management plans, surveys, monitoring, prescribed fire, invasive species control, and hiring contractors and consultants. This fund is invested with Buttonwood Partners.

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Have a specific purpose in mind for your legacy gift?

We'd love to work with you to ensure your gift supports the area of conservation that matters most to you. Please reach out to Angie Buelow at [angie@driftlessconservancy.org](mailto:angie@driftlessconservancy.org) or 608-930-3525 to discuss your intentions—we're here to honor your wishes.

## Shape the Future of the Driftless

Let's Start the Conversation



206 S. Iowa Street  
Dodgeville, WI 53533



608-930-3252



Angie Buelow  
Director of Development  
[angie@driftlessconservancy.org](mailto:angie@driftlessconservancy.org)



[driftlessconservancy.org](http://driftlessconservancy.org)



# NOTE OF INTENT

M. ROELLI

For inclusion in the Legacy Society, please fill out and return to Driftless Area Land Conservancy, 206 S Iowa St. Dodgeville, WI 53533 or [info@driftlessconservancy.org](mailto:info@driftlessconservancy.org)

I/we have named Driftless Area Land Conservancy in my/our will or estate plans.

MY/OUR FUTURE GIFT IS FROM MY:

BEQUEST                       RETIREMENT PLAN                       LIFE INSURANCE  
 APPRECIATED PROPERTY                       LAND                       OTHER

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

EMAIL \_\_\_\_\_

PHONE \_\_\_\_\_

I/WE WOULD LIKE TO BE ANONYMOUS

Though this letter of intent is an expression of my/our current plans, I/we understand that I/we may modify or revoke it and that it is not a legal obligation binding me/us or my/our estate.

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_