

# Doing good when you're gone

Janine Volkmar  
Tri-City Weekly

No one likes to think of what it means to be gone.

But many of us have good intentions about sharing our worldly goods. We just may not get around to it until it's too late.

In Trinidad, folks tell the story of the woman with the house with the ocean view who died without a will or heirs. Her house, they say, "went to Arnold."

They mean that because she died without making plans her house became the property of the state of California. Arnold Schwarzenegger was the governor at the time.

Shaking their heads they say, "Wasn't it a shame. That house could have helped to

build our new library or taken care of stray dogs or cats."

Those same folks may not have made wills either. According to FindLaw.com, more than more than 65 percent of us have not.

Only one in three Americans have a will, according to the results of the website's new survey.

Yet there are local resources to help with that planning, especially for charitable purposes. The Humboldt Area Foundation and the Northcoast Regional Land Trust are two such organizations.

The community has the will to make such plans.

"This is the goosebump moment, how much care there is out there in the community, neighbor to neighbor," said Chris Witt, director of donor

services at the Humboldt Area Foundation. "People want to turn their resources into something good."

Sometimes there's a specific objective.

"I really believe in the land trust model," said Lindsay Green, executive director of the Northcoast Regional Land Trust. "In terms of wanting to leave a legacy, I don't know of a better model for someone to invest in. It's forever."

Both women are knowledgeable and willing to help would-be donors.

"Part of my job is to help you figure out what it is that you want to do charitably," Witt said. "We help by providing referrals to attorneys with expertise in estate planning."

Witt explained that if an individual is not interested in the Foundation then "we coach people on how to make direct gifts to nonprofits."

The Humboldt Area Foun-

ation is a community foundation but does not pursue donors. They come to the foundation office and can set



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**Lindsay Green, executive director Northcoast Regional Land Trust, is a fourth-generation Humboldt County native.**

up a fund for a very small amount to start off.

"People trust us," Witt said.

Looking at the donor yearbook and noting the wide variety of funds started, it's easy to see that's true. Individuals have started funds in memory of a loved one, as a way of celebrating an event or just for a good cause. The donor yearbook reflects the diversity of interests in the county from medical care for low-income children to scholarships to animal welfare.



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**Chris Witt, director of Humboldt Area Foundation's donor services.**

Some donors start funds during their lifetimes so that they can be clear about their wishes. Then the funds are added to by their wills after their deaths.

Others are started as bequests.

Many celebrate the lives of those who died, especially at a young age.

"One of the unexpected things for me about this job is what a special role the Foundation plays in dealing with grief," Witt said. "It's really touching. So much comes out of tragedy—death, accidents, suicide. But the family can turn tragedy into something that is good. They can carry every-

thing that's good about their loved one forward."

Others just want to set up a general fund for a broad purpose.

"Having a community foundation gives people an avenue to make an impact on where they live," Witt said.

General funds link up with other funds and can do something magical in the community, like saving the Easter Seals pool from demolition.

Witt usually meets with someone who is interested in setting up a fund. Those meetings can result in a simple two-page fund agreement.

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**Above, Julia Bednar, left, and Delores Terry. Right, Delores Terry's cat, Tessie, a stray she found in her woodshed.**



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Then the person takes that agreement to his or her attorney. Changes can be made at any time and the agreement stays in the file until the bequest.

Dolores Terry and Julia Bednar are two well-known Eureka painters who have made estate plans that include the Humboldt Area Foundation. Friends since they met in a painting class in the 1980s, Terry and Bednar spoke recently at Terry's art-filled apartment about their respective funds already established at the Foundation.

Bednar's fund, the Julia Bednar and Irene Finney Rescued Animal Care Fund, differs somewhat from the many animal funds at the Foundation which provide for spaying and neutering. This fund was set up to pay medical costs for stray, injured animals. Bednar and Finney met when they were on the board of directors of the Humane Society of Humboldt County (now the Sequoia Humane Society).

"I was on the board for 13 years and the president for three," Bednar said. "I worked with Irene who was an elderly widow who had a solitary life. Animals were her love. We heard so many stories about a person who picked up an injured animal and got stuck with a huge vet bill. It seemed so unfair to the good Samaritan. This fund will help pay those costs and the fund will grow after I'm gone."

Bednar lives near a gully in Cutten, a frequent drop-off point for stray animals. She has fed and taken care of more than 30 cats.

"I call them the Motley Crew," she said. "I have a responsibility to any animal that comes to my door. If it's a dog, I find it a good home. If it's a cat, I get it neutered and its shots. Then it can live with me."

Bednar is known for her evocative landscapes and gorgeous paintings of rocks and flowers. She sometimes charms viewers with her paintings of cats and dogs as well.

Terry's fund at the Foundation, the Harold "Hal" & Dolores Terry Endowment Fund for Animals, was established to honor her late husband. She said she also believes strongly in the daily work that local animal welfare organizations do and gives "a check every month to Miranda's

Animal Rescue and the Humane Society."

Terry's Manx cat Tessie wandered the apartment, clearly the mistress of the place.

"I found her in my woodshed," Terry said.

Both women agreed on the importance of planning ahead.

"This is something I really wanted to do," Terry explained, "and the time to do it is before it's too late."

Bednar agreed.

"If something is important in your life, make sure it happens before you're gone," she said.

Another person who has set up a fund at the Foundation is Eureka resident, Michele McKeegan. She echoed Bednar's sentiment, "The last good thing you can do in this world is leave a legacy."

McKeegan donated her house to the Foundation, creating a charitable remainder Unitrust. Eventually, half the

assets will benefit Six Rivers Planned Parenthood, where McKeegan was a director for 16 years. The other half is designated for other causes dear to her heart.

"When Ed (Olsgard) and I got married, I moved into his house," McKeegan said. "I was renting out my house in Arcata and it wasn't being kept up. I'm the president of Keep Eureka Beautiful," she said with a laugh, noting the irony of owning a messy property. "It was really a win-win situation. There were tax advantages to donating it, and I got the headache of being a landlord out of my life."

McKeegan and Olsgard are active in fundraising for many community organizations. Currently they are challenging the Humboldt Library Foundation by offering a \$250 contribution for every new member of the Legacy Circle



**Michelle McKeegan, right, and her husband Ed Olsgard.**



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**Marge Custis**

added in 2013. Legacy Circle members are those who have remembered the Library Foundation in their will or estate planning.

And the Humboldt Library Foundation is one of Eureka resident



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t, and her husband

Marge Custis' current projects, but it's just one of her many passions. Custis is known as the powerhouse volunteer of fundraising in the area, having raised millions of dollars for hospitals, children's causes and other organizations. Right now she is gathering support for the Legacy Circle by inviting people to lunch and "making her pitch."

Custis is also well known among her friends for her commitment to estate planning.

"Max and I made a will when we had our first child," she said. "So many people don't have a will. We should be talking to younger people.

They're the ones who don't have their life planned."

Her son and daughter are supportive of her efforts.

"I told my children you only get 45 percent each. Ten percent will go to four nonprofits. My son said to me, 'Mom, it belongs to you, spend it.' I'm not really a shopper," she said.

What Custis is is a longtime fundraiser to whom most people can't say no. (See TriCity Weekly profile March 8, 2011)

She reminds those who want to give that "it's very important to put down the full name of the organization," recounting a legal fight by a local group to get a bequest intended for them that went, because of confusion over a name, to the national office. "And people who give to churches have to be really careful because of similar names," she said.

Custis would be glad to see the new generation of fundraisers as exemplified by Lindsay Green at the Northcoast Regional Land Trust.

Green is a fourth generation Humboldt native and a graduate of Humboldt State University. She has been the land trust's executive director for six years and still retains an infec-

tious enthusiasm for the idea of land trusts.

"Perpetuity is such a cool word," she said, "but it takes money."

She cited a recent gift from the estate of Louise Watson, an HSU professor who loved people, wildlife and organizations that protect open space.

Watson left a planned gift of her property on Patrick's Point in Trinidad because as she said, "don't want the land being broken up into a bunch of lots and sold."

By creating a conservation easement the land, animals and plants are all protected forever. And the organization benefitted for its work, too. The property was sold with an easement in place to protect the land, while the proceeds benefitted the land trust.

"Gifts like that are transformational for nonprofits," Green said. "We set aside a nest egg."

But the land trust will have the ongoing responsibility to ensure the conservation easement is respected.

The Trust has recently added a section, Leave A Legacy, to its website, and a box to check on its donor envelopes to encourage people to remember the organization in their wills.

There are many land trusts in the area and the Northcoast Regional Land Trust is the fiscal sponsor of the local council of land trusts, which covers seven counties in the northwestern part of the state.

"We're really careful," Green said. "If someone calls us about an area that's part of the Sanctuary Forest or the McKinleyville Land Trust, we refer them there."

Stewardship of the land is the goal of all the land trusts.

Would-be donors don't have to have a large property to aid these groups. Even a small property can be beneficial if it is sold and the proceeds are used to protect larger projects.

All donors, both Green and Witt agree, should talk to the nonprofit before making a bequest, to see if "it's a good fit."

And doing it sooner, rather than later, is key, according to Custis and Bednar. The North Coast is rich in worthy nonprofits.

"We are supposed to be here for a purpose," Bednar said.



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