

## ARE YOU PLANNING TO VISIT US?

If you plan to visit Mystic Seaport, please let us know. We would be pleased to meet you and to organize a special tour of the Museum. We deeply appreciate your commitment to Mystic Seaport, your support is vital to our success.

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founders of the Block Island Tuna Club. He was an active participant in programs against the pollution of the Connecticut River. His grandfather was Clark Greenman, who along with his two brothers Thomas and George ran the Greenman Brothers Shipyard on the site we know today as Lighthouse Point at Mystic Seaport. It was on Christmas Day in 1929 that Charles Stillman, Carl Cutler, and Edward Bradley met to form the Mystic Historical Association which ultimately became Mystic Seaport. Just one decade later, Charles Stillman passed away, a tremendous loss to his friends and family and also to the Museum. However, he had planned ahead and made provisions for a large portion of his estate to be gifted to the Museum. This first bequest helped to establish an endowment for the programs and future operations of the Museum, and began what has become a tradition of legacy giving among members and friends of Mystic Seaport. To learn more about including Mystic Seaport in your plans contact the advancement office at 860.572.5365 or go to [www.mysticseaport.org/legacygiving](http://www.mysticseaport.org/legacygiving)

## ADVISOR'S CORNER

### WHY SHOULD YOU CARE ABOUT ESTATE PLANNING?

The idea of discussing death and taxes is daunting to most individuals, but planning ahead is the responsible thing to do, and it shows your loved ones that you cared enough to tackle the issues ahead of time - sparing them the anxiety at a difficult time.

Estate planning involves consideration of the issues surrounding your own circumstances, both personally and financially, and developing a plan that meets your own needs. It offers you an opportunity to control and manage your estate upon death or incapacity, and can also include ways to handle decision making surrounding your health care needs.

### WHY PLAN AHEAD?

- Opportunity to control and manage assets in the event of incapacity
- Determine how to pay for long-term care costs
- Plan the funeral service you want
- Spare your loved ones from having to make decisions when they are emotionally distraught.
- Deal with family issues and problems
- Minimize taxes and costs
- Plan charitable gifting. Charitable gifting is a great way to reduce your taxable estate while leaving a lasting legacy.
- Determine who gets what and when at the time of your death, especially if there are special circumstances in your family such as a beneficiary with special needs, minor children, blended families, etc.

### WHAT DOES YOUR ESTATE CONSIST OF?

Some asset classifications are as follows: real estate, time shares, bank accounts, stocks, bonds, retirement plans, businesses, life insurance, annuities, trusts, cars, boats, and other tangible personal property. It is invaluable to keep a list of assets, and where they are located, for the benefit of your Executor or Agent under your Power of Attorney.

No matter what the size of your estate, everyone can benefit from estate planning. Individuals with assets that exceed certain threshold amounts should also consider some form of tax planning.

Basic estate planning documents consist of a Powers of Attorney, Appointment of Health Care Agent, Last Will and Testament, and for some people, a Living Trust. Speak to your estate planning attorney about which documents are right for you.

**Susan B. Pochal, Attorney at Law with Pochal & Pochal, LLC located at 86 Denison Avenue, Mystic, CT 06355. Susan and her husband Mark have been Mystic Seaport members since 1993.**

## ABOUT THE CHARLES K. STILLMAN LEGACY SOCIETY

Dr. Charles K. Stillman was one of the original three founders of the Museum. He was a practicing physician in New York from 1907 to 1911. In 1911, he left New York for his home in Mystic for a period of rest intended to be temporary, however he never returned to the city. While in Mystic, he engaged in yachting and fishing activities and became one of the founders of the Block Island Tuna Club. He was an active participant in programs against the pollution of the Connecticut River. His grandfather was Clark Greenman, who along with his two brothers Thomas and George ran the Greenman Brothers Shipyard on the site we know today as Lighthouse Point at Mystic Seaport. It was on Christmas Day in 1929 that Charles Stillman, Carl Cutler, and Edward Bradley met to form the Mystic Historical Association which ultimately became Mystic Seaport. Just one decade later, Charles Stillman passed away, a tremendous loss to his friends and family and also to the Museum. However, he had planned ahead and made provisions for a large portion of his estate to be gifted to the Museum. This first bequest helped to establish an endowment for the programs and future operations of the Museum, and began what has become a tradition of legacy giving among members and friends of Mystic Seaport. To learn more about including Mystic Seaport in your plans contact the advancement office at 860.572.5365 or go to [www.mysticseaport.org/legacygiving](http://www.mysticseaport.org/legacygiving)



## LEARNING THE SHIPWRIGHT'S TRADE

On June 15, 2014, sitting on top of a mooring in the middle of the harbor in Newport, R.I., I found myself in a moment of total amazement. Fourteen hours earlier the last wooden whaleship in the world, the *Charles W. Morgan*, left the dock in New London to embark on a three-month tour of the northeast whaling ports. I was tasked with the helm of her tender, the 28' hard bottom inflatable *Bonecrusher*. Now, after a long, hot trip, averaging 5 knots in an open center console, I was surrounded by hundreds of boats, staring at the *Morgan's* bow trying to attach two 8" shackles while sitting atop this mooring. Then, things seem to stop, I sat back, took in what was going on and found myself amazed but not surprised. This was just another day working for Mystic Seaport.

In 2010, I graduated from the International Yacht Restoration School (IYRS). Being in the marine trades since I was 12, IYRS was an inevitable path. Growing up on the water, sailing and working in the Thimble Islands off the coast of Stony Creek, CT, I fell in love with boats and boating. I guess you can say working with my hands is in my blood. I come from a very long line of stonecutters and quarry men, being the first in 12 generations to not work in the Stony Creek quarry but turning to wood working instead. I dropped out of high school my senior year to pursue a life of travel and work, from organic lettuce farming on Hawaii to restoring a Victorian home in Virginia and to plowing snow in Burlington, VT, I tried to gain as much experience as I could and after years of finding out what I didn't want to do, I enrolled at IYRS.

In the interim between my first and second year, I did an internship at Mystic Seaport with the intention to come back to the Museum to work after graduation. Unfortunately, the stars were just not aligning for this and I was unable

to return immediately. Three weeks before graduation, I was hired by Morris Yachts in Bass Harbor, ME, and went to work running the carpentry department for their service yard. After a year working for Morris, I moved back to Connecticut where I worked for myself doing a few restorations and building a 28' composite powerboat hull. My return to Mystic Seaport came in November of 2012, after receiving a phone call from shipwright Walter Ansel saying that they needed help with the *Morgan*. I dropped what I was doing and came to work for the Museum. I had originally been hired only until the launch of the *Morgan*, but now, over three years later, I feel like an intricate part of the Shipyard and this unique and amazing Museum.

The day-to-day life of working as a shipwright is ever changing. Given the opportunity to work on projects that I would not find anywhere else in the world, gives me the ability to learn skills from masters of the trade. Whether it is learning

to swing an adz from Roger Hambidge, to caulk from Rob Whalen, or how to run the 1930s circular saw mill from Scott Noseworthy, I'm always learning and always trying to absorb all that I can. Mystic Seaport is the

repository of a wealth of knowledge that can only be preserved by passing it along generation to generation. Being "young" in this field I feel obligated to learn all that I can to keep these skills and traditions alive and this is imperative for Mystic Seaport to keep moving forward as well.

TO BE CONTINUED

by MATT BARNES



**"I feel obligated to learn all that I can in order to keep these skills and traditions alive"**

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## PERPETUATE YOUR ANNUAL FUND GIFT TO MYSTIC SEAPORT THROUGH A BEQUEST GIFT TO THE GENERAL ENDOWMENT

### PLAN YOUR GIFTS TO CHARITY TO MAXIMIZE IMPACT AND BENEFIT TO YOU

- Rather than giving cash to a charity, consider giving appreciated securities and using your cash to replace those shares at a stepped up basis.
- Rather than giving cash to charity, consider purchasing additional life insurance with the funds and naming the charity as the beneficiary.
- If you are aged 70 1/2 and required to take a mandatory minimum distribution from your IRA, consider making a qualified gift to charity directly from your IRA and minimize your income taxes.

### QUALIFIED GIFTS TO CHARITY

**(CHARITABLE IRA ROLLOVER)** In December of 2015, Congress passed the PATH Act (Protecting Americans from Tax Hikes). This act contained language making permanent the Charitable Rollover Provision in the tax code. Beginning in 2016, taxpayers aged 70 1/2 and older who are required to take a mandatory minimum distribution from their IRA accounts will be permitted to directly transfer up to \$100,000 to a qualified charity. Such transfers can be applied against the mandatory minimum distribution requirement but they are not counted as part of the taxpayer's adjusted gross income. For many donors this tax treatment is more favorable than the standard tax deduction for this same gift.

*As with any philanthropic decision, please consult with your own qualified financial, legal and/or tax advisor before making any decisions about your charitable giving, will or estate plans.*

IF YOUR ANNUAL FUND GIFT IS AMT OF:	PERPETUATE IT WITH AN ENDOWMENT GIFT OF:
\$500	\$10,000
\$1,000	\$20,000
\$5,000	\$100,000
\$10,000	\$200,000
\$25,000	\$500,000

*Illustration presumes a 5% draw on endowment.*



**FRED & HELGA KERTULA**

*“Society grows great when old men plant trees whose shade they know they shall never sit in.”*

*-Anonymous Greek Proverb*

### HONORING A FAMILY'S HERITAGE

Helga grew up on the coastline of Germany. Her father was in the German Navy and then the merchant marine. He ultimately owned and operated his own freighters. Helga says she must live by the sea and that Mystic Seaport reminds her of her youth and her family's heritage.

When she and Fred were ready to retire, one of the reasons they chose to join the community at StoneRidge in Mystic, CT, was to be close to Mystic Seaport. Helga and Fred wish to safeguard Mystic Seaport for

future generations and have provided for the Museum in their estate plans. Through this generous act of philanthropy, they are carrying forward a family legacy of passion for the sea and all things maritime. We are pleased to welcome them as members of the Charles K. Stillman Legacy Society at Mystic Seaport.

To learn how you can create a lasting legacy through your estate plans, contact the Advancement office at 860.572.5365 or go to our website at [www.mysticseaport.org/legacygiving](http://www.mysticseaport.org/legacygiving)



*Pictured above from left to right are: Melinda Carlisle, Senator Richard Blumenthal, Museum President Steve White, and Searle Field, Ms. Carlisle's Co-Chair of the Sail the Morgan 2014 Committee.*

## SUPPORTING THE CHARLES W. MORGAN

by MELINDA CARLISLE

I have been a member and supporter of Mystic Seaport since 1988. In my profession as a Mystic realtor and business owner, I am keenly aware of the important role of Mystic Seaport in our community. I have always been a champion and advocate for the Museum and often introduce my clients to Mystic Seaport when they move to town.

So, it was no surprise to me when I was invited to a meeting at the Museum in early 2011 to participate in a conversation about the ongoing restoration of the *Charles W. Morgan*. What was news, however, was that Mystic Seaport had decided to take the *Charles W. Morgan* to sea at the conclusion of her restoration and that the Museum was looking to the local community to help.

It came to pass that in the spring of 2011, I joined Mystic Seaport Trustee Searle Field as Co-Chair of the Sail the *Morgan* 2014 campaign. Who could ignore such a great opportunity or refuse such a unique invitation? Our goal was to lead a community-wide effort to raise awareness of the importance of the *Morgan's* presence here, her history and the daring adventure in store for her when she returned to the open seas in 2014.

In November 2011, we began with a celebration of the 70th anniversary of the arrival of the *Morgan* to Mystic. We established “*Morgan* Week” with fireworks and lantern lighting, restaurant week, historical lectures, and music in

the park in downtown Mystic—all designed to bring the community together in shared activities to benefit all. Several of these activities have become annual events. We conducted private group tours of the *Morgan*, hosted dinner parties, and invited local companies to participate in our efforts. All with the goal in mind to raise funds so the *Morgan* could go on her 38th Voyage.

As you all know by now, our efforts combined with those of the shipwrights, educators, advancement officers, Museum staff, trustees, and volunteers of Mystic Seaport met with success and the *Morgan* let slip her mooring lines from the Museum's Henry B. duPont Preservation Shipyard to sail forth to inspire a new generation. During this voyage, her cargo was neither baleen nor whale oil, but rather knowledge and inspiration.

The job is never over, the work never done. The *Charles W. Morgan* requires continuous care and attention if she is to survive and inspire our grandchildren. It is with that knowledge in mind that I made the decision to further my support in perpetuity by including a bequest gift to support the *Morgan* as part of my estate plans. If you share my passion for the *Morgan* and my belief in the vital role of Mystic Seaport in our lives and our community, then please join me and name Mystic Seaport as a beneficiary in your estate plans.