



## inside caumsett

By Janet Barone, President  
Caumsett Foundation & Resident Writer

## VOLUNTEERS FOR WILDLIFE PAYS A VISIT TO CAUMSETT



Last spring, staff from Volunteers for Wildlife paid a visit to the beautiful Walled Garden at Caumsett State Historic Park Preserve. The free family program was sponsored by The Caumsett Foundation and taught its participants about the reptiles, mammals, and birds that call Long Island their home. Our guests learned about the animals' unique nature adaptations and explored their role in our local ecosystem.

Located on the grounds of Bailey Arboretum in Locust Valley, Volunteers for Wildlife accepts nearly 2,000 "patients" each year that are in need of the special and loving care they are known for providing. Large numbers of those treated are songbirds, waterfowl, and small mammals. The hospital also treats raptors, reptiles, and amphibians. All of their "patients" are native to Long Island.

A recent rescue, for example, involved an osprey at Caumsett. A park visitor alerted staff that the bird was dangling from a tree in serious distress. A fishing lure had punctured its foot and the remaining fishing line was caught on a branch. With assistance from Caumsett staff, the New York Department of Environmental Conservation and Volunteers for Wildlife, the branch was cut and the dangling raptor was gently lowered into a net. The bird was immediately admitted to the wildlife hospital for assessment and then recovery.

Before being released back at Caumsett, the osprey went to the Sweetbriar Nature Center for a few days to be housed in a flight cage. This enabled the bird to further regain strength. Thank you to Volunteers for Wildlife for saving this wonderful bird!

You can witness the exciting release by following the @CaumsettFoundation Instagram.

Remember that you can do your part to protect wildlife like this Osprey by properly discarding fishing lures and lines, string, plastic, and any other litter you may find while exploring nature.

*Janet resides in Lloyd Neck with her husband John. She is presently serving as the President of the Caumsett Foundation and Past*



*President of North Shore Holiday House, both 401c3 charities. Janet has been on the board of the Long Island Community Foundation since 2015. Janet's hobbies include graphic design, website design and cooking.*

## legally speaking

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### WILLS, TRUSTS & ESTATES: PLAIN AND SIMPLE

# “SHOULD I HAVE A REVOCABLE TRUST?”

A Revocable Trust, AKA a “Living Trust,” is a trust created by written agreement between you, as grantor, and you (and/or another person, if you'd like), as trustee, directing the trustee to hold the assets you put in the trust and how to distribute them upon your death.

During your life, you may revoke the trust and take everything back, or take bits and pieces out whenever you want. Since you retain full control over the assets in the trust, all of the assets in your revocable trust are subject to estate taxes. Put another way, and contrary to the implication made in mailings you may have received, using a revocable trust will save you NO more in estate taxes than if you used a Will.

The use of a revocable trust is surely warranted in certain circumstances, such as if you have no close relatives living, or if you own property located in another State. There are other circumstances which may warrant the use of a revocable trust (ex. difficult heirs), but each situation should be carefully reviewed. Even if you have a revocable trust, you still need a will to dispose of any assets you own individually which did not make it into your revocable trust before you died.

If the only reason why you want a revocable trust is to avoid the “dreaded” probate of a will, note that, under typical circumstances, a New York probate proceeding is relatively quick and inexpensive (although getting a bit longer with the backlogs in the courts). Again, using a revocable trust will save you no more in estate taxes than using a will. In determining whether or not to have a revocable trust, all of the circumstances must be considered.

If there is a trusts or estates topic that you would like to know more about, please feel free to email me at [pmarcin@farrellfritz.com](mailto:pmarcin@farrellfritz.com) with your suggestion and I will do my best to cover it in a future column.

*Patricia C. Marcin is a partner at the law firm of Farrell Fritz, P.C. concentrating in trusts, estates and tax law. Patricia has lived in Lloyd Harbor for 14 years with her husband, John Pastula, their two teenage sons, Sam and Matt, and their dog, Blizzard.*



*“I’m so glad we updated our wills. Farrell Fritz helped us understand all the recent changes and the best part is, we minimized our estate taxes. I feel so much more secure about our family’s future.”*

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