



Tales from a
Sisters Naturalist

by Jim Anderson

Celebrating Journey's Flight

Who would think an insect that weighs less than a paperclip could bring so many people together for such a heart-warming time? One family drove all the way from near Yakima, Washington, to attend a butterfly party in the Sisters Area Chamber of Commerce Visitors Center last week.

Jeri Buckmann, membership and visitor center manager, went out of her way on her so-called "day off"

to open the Chamber office, rearrange everything to accommodate the expected crowd coming to celebrate the insect who unknowingly inspired a book — and achieved quite an honor and set a very important record for one of its kind.

Yes, it was the fantastic journey of Journey, the monarch butterfly, that they were honoring. Little did anyone in Sisters Middle School know what would happen when Journey took to the skies last fall.

Susie Werts, teacher at Sisters Middle School, had several monarch caterpillars in the newly created monarch waystation she and her students created at the school. Two of the caterpillars made it though metamorphosis into adults, and when Werts and her son, Kellen, discovered them hanging in their cage drying their wings, they were elated.

Werts had been in communication with Professor

David James of Washington State University who had provided her with numbered tags designed to be placed on the underside of the butterfly's hind wing so it could be identified if observed when it took off on its migratory flight to Southern California.

On September 17, 2016, Werts and Kellen attached tags to the two adult butterflies and released them. One went high into the air and immediately turned in a southerly direction and was gone in the twinkling of an eye, like it knew where it was going (which inspired Kellen to name it Journey. The other (named Hope) wandered off and was never heard from again.

The voyage of that one butterfly was record-setting because the day it arrived in the Carpinteria, California, monarch preserve, an observer looking for tagged butterflies saw it fly in. It was also seen en route on four separate occasions by other observers. The tag is designed to be read by someone looking at the butterfly with binoculars the same way people watch and identify birds.

Last Saturday afternoon, more than 50 people gathered in the Chamber headquarters to celebrate that historic voyage, and the book the middle school students attending helped to write about Journey's flight. Local author Jean Russell Nave — who also brought delicious cake — spearheaded

the book project and interviewed many of Werts' students for their ideas on what the butterfly might have encountered on its way south. Illustrations were provided by both middle and high school students.

The project took most of the 2016 school year to complete. Additional contributors included Dr. David G. James, associate professor, Department of Entomology, Washington State University; Joe Billings, a self-funded monarch enthusiast who discovered Journey in Carpinteria; Loree McCawley, a retired administrator and wildlife advocate from California who was a contributing editor for the book; Tom Landis, retired forester who has pioneered the creation of pollinator habitats in Oregon; and myself and Sue Anderson, local



PHOTO BY SUE ANDERSON

Author Jean Russell Nave.

naturalists.

Many others added their talents to the book's creation including art teachers Judy Fuentes and Bethany Gunnarson, children's literacy advocate Jill Gentry, leading outdoor publisher Rob Russell, and Conan Tigard, webmaster and photographer.

Local sponsors also helped out including Harry and Lola Books; Catherine Black of Ponderosa Properties;

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PHOTO BY SUE ANDERSON

Tagged monarch butterfly.

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Preparing Your Portfolio for Retirement

Think about this analogy: When an airplane is preparing to land, it doesn't descend 30,000 feet in a matter of seconds. Rather, it happens gradually. The pilot adjusts to the landscape and weather conditions to assure a soft landing. In the years leading up to retirement, you should begin to treat your investment portfolio in a similar manner. Prepare ahead of time to protect your assets and adjust as dictated by market and economic conditions to help assure a soft landing in retirement.

Adjusting your portfolio means taking steps to "downshift" as retirement nears, reducing some of the risks that may exist in your asset mix. While you were focused on building wealth in the years you accumulated savings for retirement, your focus should change as you approach the end of your working years. It's important to protect the wealth you've worked hard to build and position your portfolio to generate your retirement paycheck.

Dealing with unpredictability Money invested in assets that vary in value, including stocks and bonds, are subject to periodic fluctuations. In prior years, you may have had time to ride out any market turbulence and overcome short-term losses once markets recovered. If you wait until retirement to adjust your portfolio, you may be surprised by an untimely market downturn. This unpredictability could result in a "hard landing" for your portfolio, leaving you with less money in retirement as compared to your plans.

For example, a couple with \$1,000,000 saved for retirement may plan to withdraw \$40,000 each year from that account, (assuming they withdraw four percent of the principal value annually to sustain 25 years in retirement). If the money was all invested in stocks and the portfolio sustained a 25 percent decline just prior to retirement, the value would drop to \$750,000, leaving the couple with \$30,000 a year. By contrast, if they positioned the portfolio more strategically prior to retirement, they may have protected themselves, at least in part, from the market's downturn.

A gradual process The process of shifting from accumulating wealth to an income-generation focus in your portfolio should happen over time. One approach is to gradually reduce your positions in assets that are subject to greater market volatility in the years leading up to retirement. For example, that may mean reducing your portfolio's exposure to stocks while increasing positions in fixed income investments.

However, not all your money needs to be moved out of stocks, even in retirement. Equities historically have offered more growth potential than many other types of investments. Given today's long life expectancies, you want to be prepared for the likelihood that living costs will be higher 20 or 30 years from the time you begin retirement. For this reason, stocks may still make sense for your situation. You may want to reduce your emphasis on investments that seek to maximize capital appreciation and emphasize stocks that tend to be less volatile and pay competitive dividends.

Other strategies may come into play too, such as annuities that provide lifetime income in retirement, or alternative investments that can diversify your portfolio. A financial advisor can help you determine a strategy that suits your specific circumstances as you prepare for a smooth retirement landing.

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