ACROSS

1. The most popular way to give (3 words)
2. If you are 70 1/2 years or older, you can make a tax-free gift using this (abbr.)
3. An option to combine one or two years of gifts into one year
4. The professional sports team partner of the Jimmy Fund (2 words)
5. The name of the Assistant Vice President of Planned Giving
6. A community of people who have planned a legacy gift to Dana-Farber and the Jimmy Fund (abbr.)
7. Iconography that implies looking through a microscope (2 words)
8. A portion of life income gifts are tax-_______

DOWN

9. The doctor who founded Dana-Farber in 1947
10. Establish this with cash or stock and receive a deduction and income for life (abbr.)
11. _____ Williams, baseball legend who worked with the Jimmy Fund in the 1940’s
12. The fundraising arm that supports Dana-Farber (2 words)
13. _______ Matters
14. A professional who helps clients develop charitable giving strategies
15. The sum of a person’s assets and funds
16. “We _____ you Planning Matters!”
17. One of the featured colors in the new Dana-Farber and Jimmy Fund logos
18. A life income gift that can provide an immediate partial charitable deduction (abbr.)
Amy and Phil Schnipper began their relationship with Dana-Farber in December 2009 when their then nineteen-year-old daughter, Alison, was diagnosed with acute myeloid leukemia (AML). Growing up south of Boston, Amy knew that Dana-Farber was one of the best places in the country for cancer treatment. After Alison’s diagnosis while at school in New York, she took a seven-hour ambulance ride to Dana-Farber to form her care plan.

Alison went into remission, but unfortunately relapsed in November of 2010, and received an allogenic bone marrow transplant (BMT) in March 2011. She relapsed again in October of the same year and received a second BMT in January 2012. At this point, her graft-versus-host disease (GvHD), a condition in which donor cells have an adverse reaction with recipient cells, became a concern. Alison became oxygen dependent in May 2015, and ventilator dependent in March 2016. She lived with severe and systemic GvHD until the end of her life in July 2019.

Through all the treatments and relapses, Alison and her parents remained grateful for the care she received. To show their appreciation, both Alison and her parents set up separate estate plans that included gifts to Dana-Farber. Alison described a feeling of growing up with Dana-Farber because she started her treatment during the initial construction of Dana-Farber’s Yawkey Center for Cancer Care from 2007-2011. As the building went up around her, Alison underwent treatment, and at the same time, completed a Certificate in Paralegal Studies and graduated from Lesley University, with honors.

Over time, Alison and her parents built strong bonds with her care team. Even through their grief following Alison’s passing, Amy and Phil continue to express their gratitude and plan to use Alison’s bequest gift to name a fund at Dana-Farber in her memory to support other patients affected by GvHD. Both Alison and her parents’ future legacy gifts will make a powerful difference in the fight against cancer, while also honoring Alison’s strength of spirit. For Amy, the decision to support Dana-Farber and the Jimmy Fund was simple: “We were so impressed, pleased, and grateful to the doctors, nurses, and staff for the care that they provided Alison. We wanted to thank them, while simultaneously giving other patients and families access to the same treatment we received.”

This donor story has been adapted from Alison Schnipper’s own words about her treatment and experience at Dana-Farber, which she shared in January 2019.
Dear Friends,

I am delighted to introduce you to Dana-Farber Cancer Institute and the Jimmy Fund’s new branding in this special issue of Planning Matters. This new visual identity modernizes our logos and introduces an updated color palette. We are calling the Dana-Farber logo “The Lens,” as its iconography implies looking through a microscope, representing an interplay of research and treatment. The refreshed Jimmy Fund logo utilizes the same color palette to emphasize the relationship between the fundraising arm and the Institute it supports. We are excited about the historic and future significance the new logos represent.

Our new look comes at a wonderful time, as this upcoming year marks the 30th anniversary of the Dana-Farber Society (DFS). Throughout our 30-year history, we have grown our community from 90 to 1,278 members and received a remarkable $207,598,381 from realized bequests, beneficiary designations, life income gifts, and gifts of real estate. This support has been instrumental to sustaining Dana-Farber’s lifesaving mission.

As we approach this milestone, we hope you will join the DFS and help us reach our goal of 150 new members. The Pan-Mass Challenge (PMC) is also celebrating a milestone anniversary this year – its 40th in 2020. If you include the PMC in your estate plans, you may qualify for Dana-Farber Society and PMC Legacy Society membership. If you have already named Dana-Farber or the PMC in your long-term plans, please let us know by returning the attached card so that we can thank you and invite you to celebrate with us next year.

As 2019 draws to a close and we reflect on a decade of growth, please know we are here to help as you think about year-end giving and what tax-efficient donations might make the most sense for you. Enclosed you will find an overview of ways you can use donor-advised funds, stock, and IRA assets to fuel cancer research and patient care.

If you have questions, please contact me at 800-535-5577 or Erin_McKenna@dfci.harvard.edu. You can also visit Dana-Farber.org/PlanningMatters for more information. Thank you for your continued investment in Dana-Farber’s mission to conquer cancer, and we hope you enjoy the new look for our same lifesaving work!

Sincerely,

Erin McKenna
Assistant Vice President, Planned Giving
What to Know: Charitable giving under the new tax law

As we adjust to the second year of the Tax Cuts and Jobs Act of 2017, you may be wondering how to maximize your tax benefits for your 2019 charitable giving. If you are planning to make a gift before the close of the year, you may want to consider one of these tax-efficient giving strategies:

- **Gifts of Cash:** Still the most popular way to give – take advantage of the increased cash contribution limit from 50% to 60% of adjusted gross income (AGI).
- **Gifts of Stock:** Capital gains tax rates remain unchanged, so you may avoid paying capital gains on gifts of appreciated stock to create a named fund or endowment.
- **Life Income Gifts:** Charitable Gift Annuities (CGAs) and Charitable Remainder Trusts (CRTs) provide an immediate partial charitable deduction plus a lifetime income stream – a portion of which is tax-free.
- **Batching or Bunching Gifts:** Combine two or three years of gifts into one year to increase your likelihood of going over the standard deduction in that year.

Contact Erin McKenna at 800-535-5577 or Erin_McKenna@dfci.harvard.edu for more information or to notify us of your future gift.

Dana-Farber.org/ConquerCancer

IRA? QCD? DAF? CGA? What does it all mean?

There are many tax-efficient ways to give that can elevate your philanthropy and support Dana-Farber’s mission to conquer cancer. Tax-efficient gift opportunities, like Bruce Antenberg’s gift, support lifesaving research and care at Dana-Farber, but deciphering the acronyms for the many options may not seem so easy. Establishing a long-term donation is simpler than you might think, however, and learning how starts here:

- **Individual Retirement Account (IRA):** If you or a family member are 70½ or older with an IRA, you can make a tax-free gift directly from your IRA to Dana-Farber, called a qualified charitable distribution (QCD).
- **Donor-Advised Fund (DAF):** Give through your DAF to maximize your impact on the fight against cancer—your fund sponsor handles all record-keeping, disbursements, and tax receipts.
- **Charitable Gift Annuity (CGA):** Establish a CGA with cash or stock and receive a tax deduction and income for you or a loved one.

Please visit Dana-Farber.org/TaxEfficientGifts or call the Planned Giving office at 800-535-5577 to learn more.

Bruce Antenberg (second from left) made an individual retirement account (IRA) gift to honor his late wife, Leni Antenberg. This generous gift pays tribute to his wife in the newly named Leni Antenberg Breakout Area located in the Longwood Center at Dana-Farber.
Calling all advisors!

We are grateful for the assistance you provided your clients throughout 2019 to develop and facilitate impactful charitable giving strategies. Please know that we are available to be a helpful resource during the planning conversations. Should your client choose to include Dana-Farber and the Jimmy Fund in their estate plans, please notify us so we can thank them and welcome them into the Dana-Farber Society.

Tax ID number: 04-2263040
Legal name and address:
Dana-Farber Cancer Institute, Inc.,
450 Brookline Avenue, Boston, MA, 02215
Website: Dana-Farber.org/Advisors
Contact: Kathleen Sullivan at KathleenE_Sullivan@dfci.harvard.edu

What is the Dana-Farber Society?
The Dana-Farber Society (DFS) honors those who have planned a legacy gift to Dana-Farber and the Jimmy Fund. You can join this visionary community by making a gift through your will, trust, by beneficiary designation, by establishing a life income gift like a charitable gift annuity (CGA), charitable remainder trust (CRT), or a gift of real estate.

Benefits of DFS Membership:
- Knowledge that your support makes a profound difference in the lives of cancer patients and their families
- Confidential, personal planned giving guidance and recommendations
- Updates on research and patient care initiatives at Dana-Farber
- Invitation to the annual Dana-Farber Society Recognition Dinner
- Invitations to exclusive educational and social events
- Recognition in the Dana-Farber Society’s annual Honor Roll of Donors

Yes, I will help conquer cancer by including Dana-Farber in my legacy plans!

- I have included Dana-Farber and the Jimmy Fund in my estate plans
- Please list name(s) in the Dana-Farber Society as
- I prefer to remain anonymous
- I am interested in learning more about leaving a legacy gift to Dana-Farber and the Jimmy Fund
- I am interested in learning more about Dana-Farber’s President’s Circle, honoring donors who make gifts of $1,500 or more
- I have a donor-advised fund at

For more information, visit Dana-Farber.org/PlanningMatters
If you wish to opt out of receiving fundraising mailings, please call 800-525-4669 or visit JimmyFund.org/Opt-Out.