Charles Roussel is an integral part of the Dana-Farber Cancer Institute community. In addition to being a volunteer for Dana-Farber’s Adult Patient and Family Advisory Council, he recently established a remarkable bequest gift. This gift will directly support patient assistance through Dana-Farber’s Patient and Family Programs and Services, a program led by Deborah Toffler, MSW, LCSW, director of Patient and Family Programs and Services. Charles and Deborah have collaborated on numerous gifts and consulting projects. He has been and continues to be a major force in changing the cancer experience for patients and their families.

The story of Charles and his wife, Wyn, is a powerful one, and he shares it with great eloquence and enthusiasm. His words are motivating and honest, and this Q&A captures the generous spirit of their legacy gift.

What inspired you to make this incredible bequest gift?
Charles Roussel (CR): My wife’s neuroendocrine cancer is a good example of a “chronic cancer.” It’s considered cancer in slow motion—those diagnosed can live for many years, but there can be debilitating side effects that can impact quality of life and the ability to work. And, as with any serious illness, care can be expensive, even with good health insurance. This puts great financial pressure on families, often for many years.

We’ve been exceptionally fortunate to have received outstanding care at Dana-Farber, and we know that as the Institute succeeds in its mission to make cancer into a chronic, treatable condition, patient assistance needs will grow, and we want to support this need. This is why we made the bequest.

Why did you choose to make a bequest gift?
CR: While we continue to make annual gifts from our family’s donor-advised fund, our bequest to Dana-Farber is our largest commitment, reflecting our belief in, and respect for, what the Institute does, and what it is committed to do for patients and families. These gifts can often be catalytic in motivating others. We’re confident this will happen for patient and family assistance.

What would you say to someone who is considering making a planned gift?
CR: Understand what you value most in your Dana-Farber experience, whether it’s breakthrough science, outstanding care, or a particular cancer. What resonates emotionally? What do you talk about on the drive home? How do you describe your Dana-Farber experience to friends? Within each of these areas are so many needs that would benefit from a planned gift—explore these, and ensure your generosity has the impact you intend.
Dear Friends,

The past few months have been some of the most challenging for our Dana-Farber and Jimmy Fund community. Medical professionals across the globe, including our dedicated faculty and staff, are navigating unprecedented circumstances in the face of the Novel Coronavirus (COVID-19) outbreak. With uncertainty still ahead, we are adapting to a new normal. But, as difficult as it is for us, those hit hardest are our patients and their caregivers, which is why our mission to advance cancer research and care is more important than ever. Cancer does not stop and neither will we.

I have been amazed by the outpouring of support from all of you, as individuals and as companies. Many of you have asked us how to help. As Charles Roussel shares in his story and has exemplified in his giving, a planned gift is a compelling way to provide for the future of Dana-Farber without having to give up assets today. Estate planning is a deeply personal process and we know it is on the minds of many right now.

This edition of Planning Matters highlights some recent legislative changes that impact charitable giving and offers some ideas of how you can help during this uncertain time. With this in mind, please know our Planned Giving team is here to answer any questions you or your advisors may have, and to help as you consider what is best for you, your loved ones, and the charities you care about. If Dana-Farber is already included in your estate plans or you are considering creating a legacy here, please let us know as we recognize these future gifts through membership in the Dana-Farber Society (DFS). This year marks 30 years of generosity from the DFS, including crucial support to bolster Dana-Farber during challenges and triumphs.

We encourage you to keep in touch with us during this time of social distancing by attending our virtual events, or calling or emailing to share how you’re doing or request helpful resources. Please contact me at 800-535-5577 or Erin_McKenna@dfci.harvard.edu. Thank you again for your commitment and friendship. I hope to hear from you soon and see you once it is safe again to do so.

With gratitude,

Erin McKenna
Assistant Vice President, Planned Giving
Create a legacy with a life insurance gift

If you hold a life insurance policy and the original purpose of the policy no longer applies, you may consider one of four ways to give life insurance to Dana-Farber:

- **Name Dana-Farber as a beneficiary of the existing policy**
- **Donate a fully paid up policy to Dana-Farber**
- **Transfer ownership of an existing policy**
- **Establish a new policy and transfer ownership to Dana-Farber**

There are several benefits to making a life insurance gift: estate and/or income tax deductions, the ability to make a substantial gift at a lower cost, and ease of implementation and maintenance.

Visit [Dana-Farber.org/LifeInsurance](http://Dana-Farber.org/LifeInsurance) to learn more or return the attached reply device to connect with our team.

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 planned giving options benefiting Dana-Farber and the Jimmy Fund
  - Tell me more about ___________________________
- I am interested in learning more about Dana-Farber’s President’s Circle, honoring donors who make gifts of $1,500 or more

Giving in Uncertain Times

Throughout the COVID-19 outbreak, all of us at Dana-Farber know our patients are experiencing a lot of uncertainty, and we must continue to care for them, their families, and each other.

While our lives have been altered, your commitment to the future of Dana-Farber is more important than ever. We are a community committed to overcoming great challenges and obstacles, and with your help, we can get through this.

We call on you during this time to review your financial plans and consider how a legacy gift can allow you to achieve your personal and financial goals. If you have questions about planned gifts, please contact our team.

You can also make an immediate gift to the Dana-Farber Emergency Response Fund by visiting [Dana-Farber.org/Relief](http://Dana-Farber.org/Relief) or learn more about virtual events by visiting [DanaFarber.org/Together](http://DanaFarber.org/Together).

As always, you have our thanks.
What to Know: SECURE Act and CARES Act

Two new legislative changes have taken effect that could impact your 2020 taxes and the way you can support Dana-Farber and the Jimmy Fund. With this legislation in place, now is the time to review your financial plans and ensure you are set up to reach your ultimate goals.

■ The Setting Every Community Up for Retirement Enhancement (SECURE) Act: The SECURE Act made significant changes to retirement plans. Three major changes include increased time to contribute to your Individual Retirement Account (IRA), a higher required minimum distribution age, and a significant update to the IRA beneficiary rules.

Learn more at Dana-Farber.org/SECUREAct

■ The Coronavirus Aid, Relief, and Economic Security (CARES) Act: The CARES Act was passed to support individuals, businesses, and nonprofits during the COVID-19 outbreak and stipulated changes that are good news for donors and non-profits alike. For those who do not itemize their deductions, up to $300 per tax filing unit will be available in an additional tax deduction to donors who make cash gifts to charities. For those who itemize their deductions, the CARES Act allows donors to apply 100% of their adjusted gross income to cash gifts to public charities—rather than the standard 60%—in 2020.

To learn more, visit Dana-Farber.org/CARESAct

Dana-Farber Society Update

This year marks the 30th anniversary of the Dana-Farber Society (DFS). We are honored to recognize this historic milestone and thank our members for the generous legacies they have dedicated to advance cancer research and patient care at Dana-Farber. You can join us by making a gift through your will, trust, beneficiary designation, life insurance, establishing a life income gift, or giving a gift of real estate.

We were looking forward to celebrating the anniversary at the Dana-Farber Society Recognition Dinner in June. However, out of an abundance of caution, this event has been postponed.

Instead, our team has been hard at work (from home) to continue supporting you and planning new ways to connect with our DFS members and bring our community together. Thank you to those who have already made a commitment to Dana-Farber. If we can help you plan your legacy gift, please contact our team with the attached reply device.

Visit Dana-Farber.org/DFS to learn more
What We’re Reading

Summer is the time when we bring our favorite reading material to the beach or park to relax. While we might be staying closer to home this season, it is still a perfect time to crack open a new page-turner. Here, our team shares their recommended reads:

- “I am reading *How Not to be Wrong: The Power of Mathematical Thinking* by Jordan Ellenberg, which was a book recommended by Nobel Prize winner **William G. Kaelin, Jr., MD**. I am also reading *The Power of Moments* by Chip and Dan Heath.”
  - **Melany N. Duval**, Senior Vice President and Chief Philanthropy Officer

- “Professionally and personally, I have a lifelong thirst for scientific knowledge, and always stay up-to-date on the latest scientific and medical journals, including *Science*, *Nature* and others. And when I have the chance to read for pleasure, I enjoy reading about American history.”
  - **Laurie H. Glimcher, MD**, President and CEO, Dana-Farber Cancer Institute, Richard and Susan Smith Professor of Medicine, Harvard Medical School

- “I just finished reading *We Were the Lucky Ones* by Georgia Hunter. It is a true story about her family’s unbelievable determination to survive war-torn Europe. I never thought a book about the Holocaust could fill me with hope, but it did. Keep your tissues nearby for the author’s notes at the end.”
  - **Erin McKenna**, Assistant Vice President, Planned Giving
Dana-Farber’s Olga Kozyreva, MD (left), Margaret Kormushoff, PA-C, and Fran Leonard, MSN, RN, AOCN gathered on May 14 for National Hospital Week.